eMoney

The Future of Full-Spectrum Planning

Comprehensive Planning Solutions That Provide More Holistic Insights

The planning capabilities available with **eMoney Pro** and **eMoney Premier** are designed to demonstrate tangible outcomes for complex, real-world scenarios and help identify options as clients' needs evolve.

These elevated planning capabilities offer you the confidence, and the technology, to provide collaborative, insightful, and interactive planning experiences to all your clients.

All Your Planning Needs in One Place

Our vision is to unify the full spectrum of eMoney planning capabilities so you can:

- **Scale financial planning** to deliver more plans to more clients
- **Elevate your planning capabilities** to expand and deepen possibilities for your clients
- **Track and convey the value you bring** to a client relationship over time

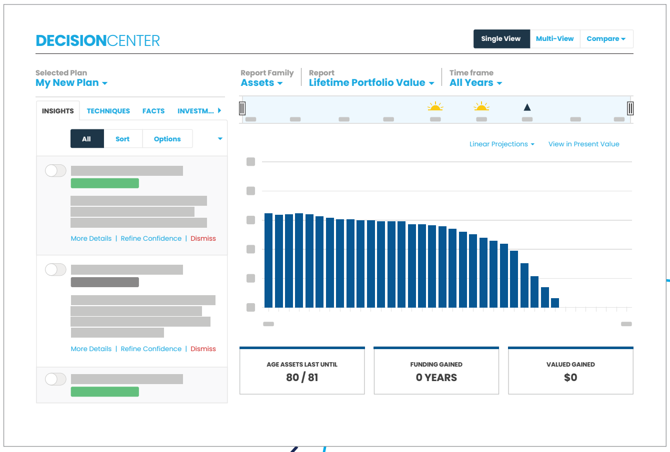
That's why we are centering new enhancements in **Decision Center**, our widely used, interactive cash flow-based planning experience. It's our aim to evolve Decision Center into a more intelligent partner serving as one true hub for all your planning activities, to make it even easier to create, edit, and present plans, in an engaging way.

Streamlined, Intuitive, and Flexible

- Experience a more seamless workflow by accessing plan details and reports all within one area of eMoney.
- Engage in interactive conversations on any topic, over any time period, to any level of granularity.
- Eliminate the need to return to Facts by editing data variables right on the spot.

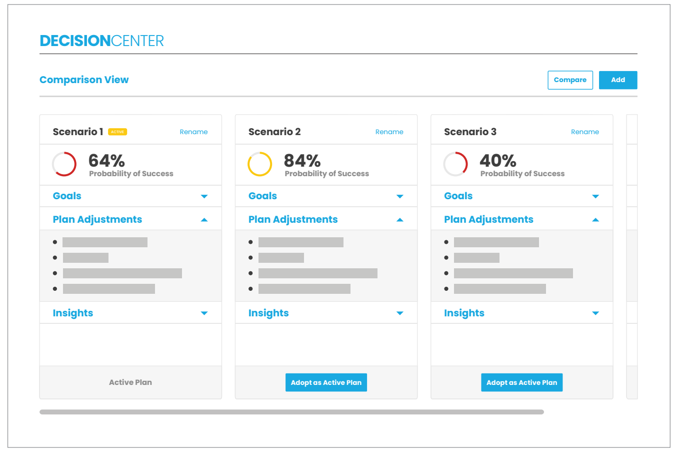
Real-time Insights and Recommended Actions

- Consider intelligent, data-driven insights and a comprehensive series of recommended actions based on an analysis of your client's plan.
- Leverage a more guided plan development experience, informed by the full scope of eMoney planning capabilities.



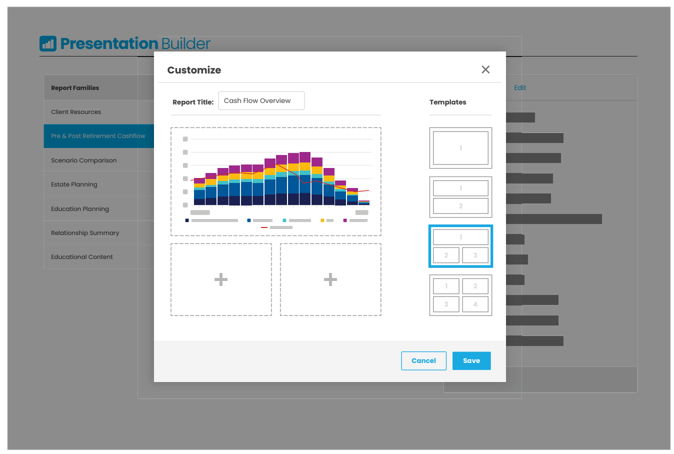
Create, Compare, Decide, and Go

- Collaborate with clients to demonstrate the impact of decisions through easy-to-understand scenario comparisons.
- Quickly implement client data changes through “adopt as active plan” functionality.



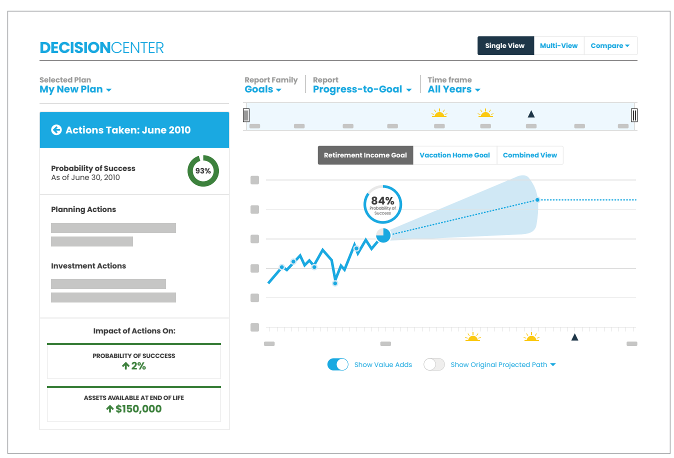
Enhanced Presentation-building Experience

- Simplify presentation assembly and delivery through a single presentation builder for all eMoney content.
- Deliver modern and engaging presentations and reports interactively throughout the planning experience or via print.
- Move and resize presentation elements, combine visuals into one page, and insert custom commentary.



Track Progress to Goals and Your Added Value

- Track progress to goals by showing where your client has been, where they are now, and what they’re working towards.
- Demonstrate the impact of actions they’ve taken, or plan to take, to reach their goals.
- Tangibly demonstrate your value throughout the client relationship.



Want to learn more?

Visit us at emoneyadvisor.com or call 888-362-4612 to schedule your free trial.