***Subject Line:***

**Deliver an Exceptional Client Experience**

Providing a portal to your clients gives them an interactive way to answer their own questions and engage with their plan.

eMoney's industry-leading client portal offers a real-time, on-demand financial experience. With features like self-registration and onboarding, mobile web access, spending and budgeting, and unlimited, secure document storage your clients can get access to their complete financial picture all in one place.

* **Organize their Financial Lives -** Encourage your clients to add pieces of their complete financial picture to the portal; everything from assets, liabilities, investments, protection policies and other accounts that encompass your clients financial lives.
* **Collaborate on Goals -** Clients can track toward priorities they have set for themselves and their family like retirement, education and specific investments.
* **Store Important Information -** With eMoney's Vault, clients can securely store important documents. Knowing where there documents (will, identification, passport, insurance) will give your clients peace of mind.

**See the client portal in action.**

**Visit www.emoneyadvisor.com to sign up for a free trial.**