***Subject Line:***

**Creating a Truly Exceptional Client Experience**

Holistic Planning addresses your client's whole life—not just their finances.

A holistic approach means thinking about the big picture. Each change you make to one part affects the whole. It's demonstrating an understanding of a client's finances, goals and aspirations, and assumptions to convey an analysis of future outcomes and recommendations.

* **Data Aggregation** - Based on real-time data, you can easily track your clients' progress.
* **Client Experience** - eMoney's client portal offers a view into your client's complete financial picture.
* **Financial Planning** - Help your clients visualize the path to accomplish their goals and aspirations.

The creation of a holistic financial plan provides the confidence and control for clients to achieve their financial goals and milestones. It's the experience that will help clients live the life they want.

**See how eMoney's solutions can support you in your holistic planning journey.**

**Request a demo today.** [eMoney note: link to Holistic Planning demo page]