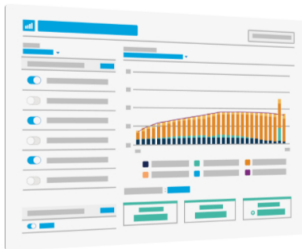


Plan Across Your Clients' Lives

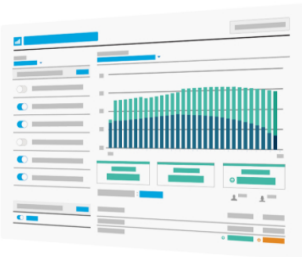
Focus on helping clients achieving their goals and demonstrate how decisions today can impact their future through eMoney's interactive planning capabilities.

At the core of eMoney's integrated platform, financial planning tools can engage your clients in the process to meet them where they are and where they are looking to be in the future. Complement the client portal we covered in the previous email with an interactive planning experience to help you meet the evolving needs of your clients.



Create Interactive Conversations

Visually demonstrating the impact of a client's decision resonates on a deeper level. Provide clients with custom financial blueprints using dozens of advanced-planning techniques and what-if scenarios.



Run Various Scenarios

Measure the impact of those decisions by providing various scenarios to clients to incorporate different paths. Work side by side and adjust techniques in real time for immediate client reactions and feedback.



Collaboration is Key

With Estate Planning techniques, collaborate with clients in a variety of ways, including charitable planning, tax calculations, and trust modeling. Use eMoney to visualize the impact of a client's decisions and the benefits of your recommendations.

See the value planning can bring to you and your clients.
Visit www.emoneyadvisor.com to sign up for a free trial

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