

eMoney

New eMoney Enterprise Packages

Hi **[First Name]**,

As a reminder, we are migrating over to a new **[enterprise name]** office of eMoney on **[date]**. You have an opportunity to be a part of this office migration by opting in by **[date]**. If you do not decide to migrate, you will miss out on some new features and benefits such as:

[eMoney note: remove "opting in" language above for a forced migration].

[Benefit 1]

Description of how this feature will benefit the advisor if they opt in to migrate.

[Benefit 2]

Description of how this feature will benefit the advisor if they opt in to migrate.

Important to Note

Once the migration occurs, the destination URL for migrated offices will differ from your existing URL. This means the Advisor Site URL and the Client Portal URL will change for migrating offices. Following the **[Date]** cutoff date, we will send a client-facing email template to share with clients to prepare them for this change.

-*[Enterprise] and eMoney Advisor*

*Final migration date is subject to change.