**Subject line:** *Your January eMoney Updates*

**SECURE 2.0 Act of 2022 Overviewand eMoney Updates**

As part of the Consolidated Appropriations Act, 2023 signed into law on December 29, 2022, the SECURE 2.0 Act of 2022 provides updates designed to help strengthen the retirement system and Americans' preparedness for retirement.

Keeping our calculations reflective of the latest laws and rules is at the top of our list of priorities and we will be releasing updates incrementally as soon as they're ready.

Learn more about updates

**More Highlights**

* How to Present a Financial Plan: 4 Tips for Greater Engagement

When financial professionals know how to effectively present a financial plan, they can better engage clients in the planning process and earn clients for life. If you're looking to make more impactful plan presentations as a financial planner, here are four tips to make sure you're maximizing engagement.

* **Reports Update Coming Soon**

In early February, the Assets, Income Tax, and Retirement Planning report families will be updated for those on standard configuration or those who have opted into the report uplift feature. These reports and presentations will be updated to include new features, improved aesthetics, and enhanced readability.

* **API Update Coming Soon**

We're transitioning the Empower Retirement (Participant) connection to APIs – an even more secure and reliable way to aggregate data. When the client connection is updated, clients will need to re-establish Empower Retirement (Participant) by re-entering their credentials to ensure their accounts remain up-to-date.

* New On-demand Training Experience for Core Concepts

The Core Concepts series is a part of our Getting Started program which covers the basics of the platform for users who are new to the platform or looking for a refresh. What was previously a series of six, one-hour live webinars has been converted to a new micro-learning pre-recorded format. *\*Note: Only applicable to those who use eMoney Training services.*