**Subject line:** *April Home Office Updates*

**Holistic Financial Planning: 4 Steps to Get Started**

Holistic financial planning incorporates a client’s total life and financial circumstances into their plan. The purpose is to go beyond helping clients achieve financial goals by supporting them in living a more meaningful life.

Learn More

**More Highlights**

* **SECURE 2.0 Act of 2022 Overview and eMoney Updates**

Keeping our calculations reflective of the latest laws and rules is at the top of our list of priorities. Check out the updates we've implemented over the past few weeks.

* **Take Your Client Conversations Further**

Check out this quick 3-minute video on how advisors can utilize the *Longevity Risk Report* and *Confidence Age* in Decision Center to take their client conversations to the next level.

* **May 2023 Training Opportunities**

Our upcoming training schedule is now available! Be sure to share relevant training opportunities with your users.

**Check out more insights and best practices for successful financial planning engagement on the**[**Heart of Advice**](https://app.response.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_March_2023&utm_medium=email&utm_source=Eloqua&s=225884627&lid=1124&elqTrackId=91DA400CBF3F1EF92ED67D8A5326AAE3&elq=034959205308458c805e3d76dc79c03a&elqaid=3642&elqat=1)**blog.**