*Subject Line: Maximize Tax Efficiency with Roth Enhancements*

**Maximize Tax Efficiency with Roth Enhancements**

Finding ways to maximize your clients' wealth is likely one of your top priorities. One way to boost your clients’ returns and net worth is by leaning on tax-smart strategies.

Watch our new video to see how you can leverage our innovative tools to add Roth conversion strategies and fill up various tax brackets, putting more money in your clients’ pockets and scaling your business to new heights.

Learn how to put into practice

**Other Highlights**

* **API UPDATE**

**TD Bank API Is Now Available**

**We recently transitioned accounts under the TD Bank connection to APIs–an even more secure and reliable way to aggregate data. If you haven't already, re-connect your TD Bank connections to ensure your accounts remain up to date.**

* **CONNECTION UPDATE**

The Industry Leader in Account Aggregation: eMoney Connection Update

In today’s digital age, financial advisors and their clients rely on account aggregation tools to simplify the process of managing multiple financial accounts in one place. We understand the importance of having an aggregation experience you and your clients can trust, and are pleased to share that eMoney is the industry leader in account aggregation tools\*.

* **UPCOMING TRAINING SESSIONS**

Diving Deeper with Reports

Understand how to effectively use our most popular planning reports and even discover some lesser known reports. This session outlines how to use reports to their full potential and present customized presentations to your clients.

\*2023 T3/Inside Information Advisor Software Survey Results