**Subject line:** *eMoney Connection Update, Roth Conversions, and more*

**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\*.

A look into recent connection and API updates

**More Highlights**

* **Maximize Tax Efficiency with Roth Enhancements**

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

* **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. Advisors and clients can now re-connect their TD Bank connections to ensure their accounts remain up to date.

* **CE Webinar: From Client Resistance to Action**

Join us on Thursday, June 1 at 2:00 p.m. ET to learn why your clients may pay you for your advice only to ignore it.Using tools from financial psychology, neuroscience, motivational interviewing, and behavioral finance, you'll learn about the stages of change clients go through, how their brains respond to stressful events (which may include visits to your office), and how to help them find their own motivation to change.

**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.**

\*2023 T3/Inside Information Advisor Software Survey Results