**Subject line:** *Your Monthly eMoney Newsletter*

**How Financial Professionals Can Meet Clients’ Personalization Expectations**

Clients want to work with someone who gets to know them beyond their financial holdings and understands their values, concerns, and passions. Learn more about what personalization aspects are important during the planning process.

Top 5 Personalization Aspects

**More Highlights**

* **NEW IN-APP MESSAGE**

**Unleashing the Power of Annuities in eMoney**

To help educate your users on Annuities in eMoney, we'll be sharing a short video that demonstrates the impact of an annuity on a client’s cash-flow based retirement plan.

* **TRAINING UPDATE**

**2023: An Enhanced Learning Experience and Training Improvements**

Those who participate in eMoney’s live webinar training opportunities are 70% more likely to continue using eMoney with confidence. Read more about how we continue to enhance our training experience to meet your clients' evolving needs.

* **2023 EMONEY SUMMIT**

**Beyond the Plan: Join us virtually from October 16-18**

Learn how to enhance your value as a financial professional and provide the personalized experiences clients are seeking while unlocking your full potential as a trusted partner.

* **Introducing the New eMoney Corporate Site**

Explore our refreshed website to learn more about our leadership team, case studies, upcoming events, and more!.

**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.**