**Subject line:** *The Role of APIs in Expanding Financial Planning*

**From Prospect to Plan: The Role of APIs in Expanding Financial Planning**

For the largest financial planning firms, leveraging APIs in the right way can help serve clients differentiated content and expand financial planning services across the enterprise.

What can a firm do with APIs for financial planning?

**More Highlights**

* **CUSTOMER SERVICE UPDATE**

**Coming Soon: Enhanced Live Chat Support**

To better serve your financial professionals, we're updating our Live Chat feature. Users will soon have the ability to attach files (including word documents, screenshots, etc) in their conversations with customer service reps, using the paperclip icon within the message box. In addition, the *Chat with Support* button is moving to the bottom, right side of the screen.

* **CONNECTION UPDATES**

**Coming Soon: TD Ameritrade to Schwab**

A highly anticipated TD Ameritrade to Schwab migration is coming in September. We are currently working to ensure a seamless transition for our users and will continue to keep you updated.

* **2023 EMONEY SUMMIT**

[**Beyond the Plan: Agenda Is Now Available**](https://app.response.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_July_2023&utm_medium=email&utm_source=Eloqua&s=225884627&lid=6654&elqTrackId=AB10923529A66D7AED0D6D40D0E4395C&elq=0b3577f4a87d428faf4cfcefd14fae53&elqaid=3998&elqat=1)

At our upcoming eMoney Summit, financial professionals will have the opportunity to hear new research findings from eMoney leadership along with thought-provoking presentations from our amazing Keynote speakers, earn CE credits, gain personalized support with one-to-one coaching sessions, and more.

* [**eMoney Leadership Team Updates**](https://app.response.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_July_2023&utm_medium=email&utm_source=Eloqua&s=225884627&lid=6727&elqTrackId=7B2C8F67500E9C8D3B8DE4E9B8C2B325&elq=0b3577f4a87d428faf4cfcefd14fae53&elqaid=3998&elqat=1)

CEO Susan McKenna announced updates to our leadership team earlier this month. Megan Murray was promoted to chief operating officer, and Rachel Eccles was promoted to head of marketing. Additionally, Morgan Jones, SVP, Sales, will be retiring July 31.

**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.**