**Subject line:** *eMoney Home Office Updates for August 2023*

**The 7-Step Financial Planning Process: How Advisors Can Adapt for Compliance**

The CFP Board defines financial planning as a collaborative process that helps maximize a client’s potential for meeting life goals through financial advice that integrates relevant elements of the client’s personal and financial circumstances.

Learn More

**More Highlights**

* **CUSTOMER SERVICE UPDATE**

**Enhanced Live Chat Support**

To better serve your financial professionals, we've updated our Live Chat feature. Users now 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 moved to the bottom, right side of the screen.

* **REPORT UPDATE**

**Income By Security Report**

As part of our transition to a new investment data provider, eMoney has enhanced its ability to filter out capital gains distributions in the *Income By Security*report, so it reports only income distributions. You may notice a decrease in reported income for some mutual funds as a result of this.

* **CONNECTION UPDATE**

[**Coming Soon: TD Ameritrade to Schwab**](https://app.response.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_August_2023&utm_medium=email&utm_source=Eloqua&s=225884627&lid=7189&elqTrackId=0DE31AB0AA2D17860F974CDA824F195C&elq=b2693804705241cc9699e6ddca32c161&elqaid=4070&elqat=1)

Between September 2-6, 2023 all connections currently under *TD Ameritrade—via Direct Feed* will be converted to *Schwab Institutional—via Direct Feed*. Following the completion of the Schwab load and system refresh on September 6, 2023, users can anticipate new values to be displayed within their eMoney accounts.

* **2023 EMONEY SUMMIT**

[**Beyond the Plan**](https://app.response.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_August_2023&utm_medium=email&utm_source=Eloqua&s=225884627&lid=6654&elqTrackId=AB10923529A66D7AED0D6D40D0E4395C&elq=b2693804705241cc9699e6ddca32c161&elqaid=4070&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.

* **Did You Know About Our University Program?**

The eMoney University Program provides students earning financial planning degrees at over 130 universities with access to eMoney and the option to prove their competency by earning an eMoney Certification. If your firm is hiring new staff but wants to be mindful about the effort involved in teaching new recruits the eMoney application, we recommend posting your job listing directly to [**our private LinkedIn group**](https://app.response.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_August_2023&utm_medium=email&utm_source=Eloqua&s=225884627&lid=2383&elqTrackId=AC60D3890F788763548539EF432136F7&elq=b2693804705241cc9699e6ddca32c161&elqaid=4070&elqat=1) comprised of hundreds of former and current University Program participants! Tapping the “join" button will give you access to the group within 24-48 hours.

**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.**