**Subject line:** *Now Is the Time for a Renewed Focus on Planning*

**Now Is the Time for a Renewed Focus on Planning**

Introducing financial planning into your practice or expanding the planning you are already doing is a powerful way to grow your business.

Check out our eBook, From Portfolio Manager to Financial Planner Using the Data You Have to Evolve Your Business and Client Relationships, to learn how to maximize the client data you have and leverage it to make more personalized, informed recommendations.

Download the eBook

**More Highlights**

**UPCOMING CE WEBINAR (1 CFP® CE Credit)**

[**Planning with Emotional Intelligence**](https://response.emoneyadvisor.com/Dec_CE_Webinar?utm_campaign=CC_HO_Newsletter_November_2023&utm_medium=email&utm_source=Eloqua&elqTrackId=5299BA81D5B4D62F0EFE31271AD3EDE0&elq=6ecadc2c58c64c0099bce1e842e56f45&elqaid=4363&elqat=1&elqCampaignId=)

Join us on Thursday, December 7 from 2:00 p.m. to 3:00 p.m. ET to explore how building your emotional intelligence skillset can provide value to create longer-lasting client-planner relationships.

**BEST PRACTICES**

[**Leveraging Technology for Generational Wealth Planning**](https://app.response.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_November_2023&utm_medium=email&utm_source=Eloqua&s=225884627&lid=7960&elqTrackId=481E9A52A45D332D5A0666F6D5C3B687&elq=6ecadc2c58c64c0099bce1e842e56f45&elqaid=4363&elqat=1)

Advisors who want to futureproof their practices know that connecting with the next generation of clients is crucial. Learn a few ways that embracing technology can help bridge the gap between the generations.

**ADVISOR RESOURCES**

[**Know Your eMoney Resources**](https://app.response.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_November_2023&utm_medium=email&utm_source=Eloqua&s=225884627&lid=1648&elqTrackId=6A294CFCF735BF31E046BE9A62E4672D&elq=6ecadc2c58c64c0099bce1e842e56f45&elqaid=4363&elqat=1)

Whether your users are just getting started or they are more experienced, there are always new techniques to learn and different ways to incorporate eMoney into their business. Check out the help resources eMoney has available and be sure to share those (*that are applicable to your version of eMoney*) with your financial professionals.

**T3/INSIDE INFORMATION SURVEY**

Our clients provide invaluable feedback that informs our product roadmap and helps enhance the eMoney experience. With this in mind, we encourage all eMoney users to participate in the annual [**T3/Inside Information Survey**](https://app.response.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_November_2023&utm_medium=email&utm_source=Eloqua&s=225884627&lid=7950&elqTrackId=C3B4767A57BCE57931F79F474ABFEAF6&elq=6ecadc2c58c64c0099bce1e842e56f45&elqaid=4363&elqat=1). We’re looking forward to seeing the results at the 2024 T3 Conference in January!

**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.**