**Subject line:** *Home Office News: Tax Planning Tips, Summit Recap, and more*

**5 Tax Planning Tips for Advisors to Consider by Year-End**

One of the most valued services provided by a financial advisor, according to 78 percent of investors, is tax planning.1 As the end of the year approaches, learn more about tax planning considerations for financial advisors.

5 Tax Planning Strategies

**More Highlights**

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

[**Integrating Academic Research and Technology into Your Service Delivery, Part 2**](https://response.emoneyadvisor.com/Nov_CE_Webinar?utm_campaign=CC_HO_Newsletter_October_2023&utm_medium=email&utm_source=Eloqua&elqTrackId=BD2793DC0D30B60887DB57BBB6597103&elq=a22c7debbfb140af999f800ac9ca0dd1&elqaid=4273&elqat=1&elqCampaignId=)

Join us on Thursday, November 2 from 2:00 p.m. to 3:00 p.m. ET as we demonstrate how to deliver efficient and thoughtful financial planning services. This webinar will show how using eMoney gives clients an understanding of their current and future situations by pairing empirical evidence with client experience.

**2023 EMONEY SUMMIT**

[**Summit 2023 Recap**](https://app.response.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_October_2023&utm_medium=email&utm_source=Eloqua&s=225884627&lid=7753&elqTrackId=D6849AE7A7EE1FF4BD3F4A9E7F88CD3B&elq=a22c7debbfb140af999f800ac9ca0dd1&elqaid=4273&elqat=1)

During the 2023 eMoney Summit, financial professionals convened over three dynamic days to delve into the theme: *Beyond the Plan.* In this post, we recapped essential insights and highlighted our favorite moments from popular sessions.

**NEW IN APP MESSAGE**

[**Maximize the Client Onboarding Experience Using Aggregation**](https://app.response.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_October_2023&utm_medium=email&utm_source=Eloqua&s=225884627&lid=7822&elqTrackId=C99EFEF2911CD8E564386F7A69758693&elq=a22c7debbfb140af999f800ac9ca0dd1&elqaid=4273&elqat=1)

Discover the power of seamless data integration to enhance client relationships. The Onboarding tool, partnered with account aggregation, is designed to facilitate seamless client interactions. Watch this short video showing how this feature works in practice.

**NEW KNOWLEDGE BASE PODCAST**

Introducing a NEW channel to take you deeper into important areas of eMoney: the Knowledge Base Podcast! This new podcast, accessible only to eMoney users by searching "podcast" in the *Help* meu, empowers you to hear directly from the product experts themselves via dynamic and lively conversations.

**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.**