**Subject line:** *A Step-by-Step Approach to Developing Holistic Financial Plans*

**A Step-by-Step Approach to Developing Holistic Financial Plans**

Across the wealth management industry, there’s been heightened interest in holistic financial planning. That is, financial planning that’s deeply personal and helps clients work towards what they truly want to pursue in life.

Learn More

**More Highlights**

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

**Overwhelmed and Burned Out: Working with Clients Even When You Don't Feel Like It**

Join us on Thursday, October 5 from 2:00 p.m. to 3:00 p.m. ET for an exploration of stress and burnout as well as the tools you can use to keep thriving in your work with clients.

**2023 EMONEY SUMMIT**

**Beyond the Plan**

The eMoney Summit is less than a month away! Join us to hear new research findings and product updates from eMoney leadership along with thought-provoking presentations from our amazing keynote speakers.

**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.**