

Client Portal Design Enhancements

March 2024

In anticipation of the Client Portal design enhancements coming this March, eMoney has been hard at work ensuring your advisors and their clients are prepared. Although there will be no changes to functionality in the upcoming design uplift, we anticipate advisors may receive questions from their clients. **Our goal is to ensure advisors are adequately prepared ahead of time, and we look to our valued home office partners to help convey the message to all eMoney users.**

Assets not included below can be found in the [Communications Resource Center \(CRC\)](#), under the sub-category, *Product Updates*, within *Engagement*.

Why Engagement Matters:

- Frequent client portal users show higher levels of trust, loyalty, and satisfaction with their financial advisors. They are also more likely to refer their advisor to others, demonstrating the positive impact client portal utilization has on client-advisor relationships.¹
- Research conducted by eMoney in collaboration with the Financial Planning Association shows that client portals effectively lessen clients' financial anxiety. When clients feel less anxious, they are more likely to trust and stay loyal to their advisors.²
- **How the Client Portal helps to deliver on this:** The portal is an invaluable tool for collaborating with clients for more productive, long-term financial planning relationships.

Read the full blog post, [How Client Portals Make Financial Planning More Profitable](#).

eMoney Communications Overview (Pre-Launch)*

■ Advisor-facing ■ End-client

- **January 18**
First 'Coming Soon' to Advisors
First official email to all EMA advisors.
 - *Inclusions:* Release timeframe, new redesign screenshot, [client webinar promotion](#)
- **January 30**
Next 'Coming Soon' to Advisors
Mentioned in the January Product Release notes and email.
 - *Inclusions:* [Teaser video for EMA](#) (Includes design uplift and new My Advisor page)
- **January 30 - February 20**
Webinar Promo In-app and Customer Service Hold Message
An in-app popup is viewable from the Advisor dashboard for all advisors, planners, and assistants, along with a message recording on the eMoney Customer Support line promoting the client webinar.
- **February 13**
Client Portal Podcast Episode Live
A short podcast interview with Chris Grant, Product Manager for the Client Portal, is available only to eMoney advisors from the in-app *Help* menu.

February 14

End-client 'Coming Soon' In-app Message

A simple in-app popup is live for your advisors' clients accessing their portal, informing them of the coming design update.

February 15

Next 'Coming Soon' to Advisors

An email communication to all EMA advisors.

- *Inclusions: End-client-facing email template suggestion, teaser video, webinar registration reminder*

February 20

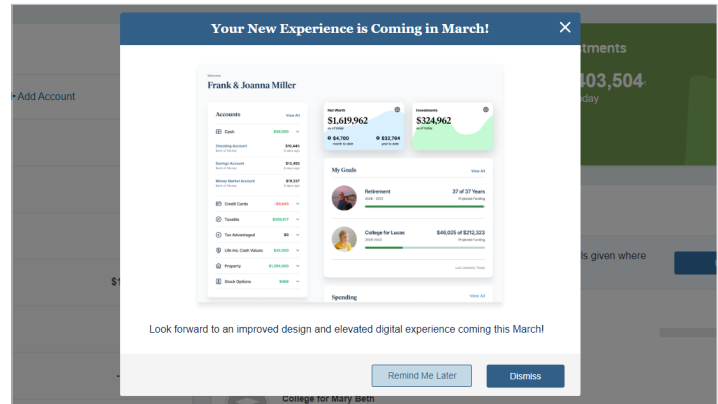
Advisor Webinar

This [webinar](#) will provide advisors another opportunity to learn more about the upcoming enhancements to the Client Portal. During this session, they'll learn about how these updates fit into our broader product vision, along with some takeaways on preparing their clients for the new experience.

February 27

Additional 'Coming Soon' to Advisors

Mentioned in the February Product Release notes and email.



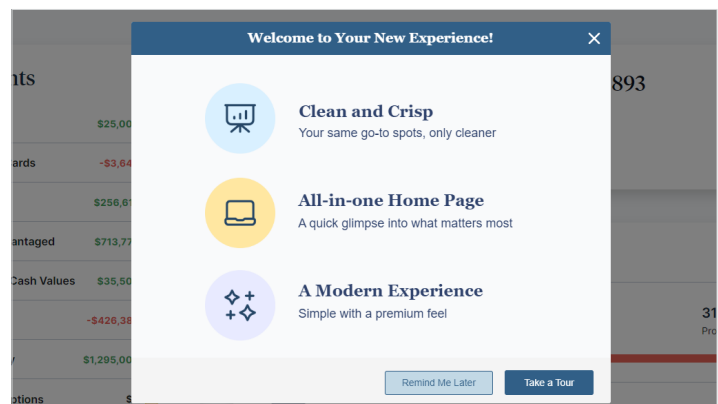
★ March 5 Launch

Advisor Communications:

- Email and Blog Post
- March 26 Product Update Release Notes
 - *Inclusions: Launch video, user experience directive to turn on their new My Advisor page, end-client-facing email template suggestion*
- In-app Message

End-Client Communications:

- In-app message pushing to a virtual tour around the updated Client Portal



For more information, please refer to your Communications Resource Center (CRC) or reach out to your primary eMoney point of contact.

**Communication dates subject to change.*

1. eMoney Beyond the Plan Research, July 2023, n=504 advisors, n=1,003 end-client investors

2. eMoney and Financial Planning Association, The Transformative Power of Technology on Client Relationships, September 2023, n=849 advisors