eMoney

eMONEY USER COMMUNICATIONS OVERVIEW

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 Client 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 of utilizing the client portal 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 - 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 6

Next 'Coming Soon' to Advisors

Communication approval requests for January Enterprise Advisor Newsletter.

- *Inclusions: Teaser video*

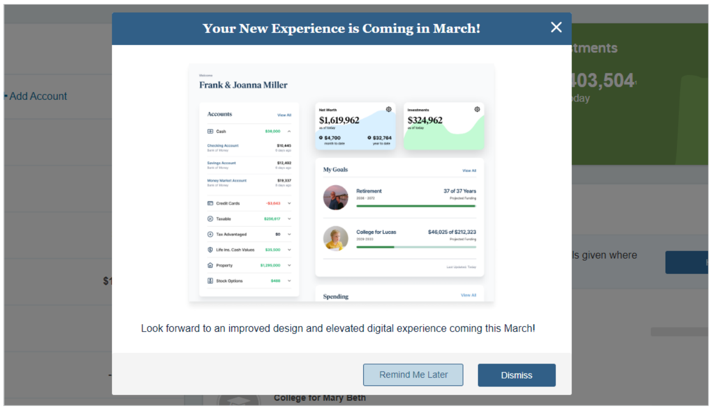
February 13

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

Communication approval requests for one-off email to 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 Enterprise Advisor Newsletter.

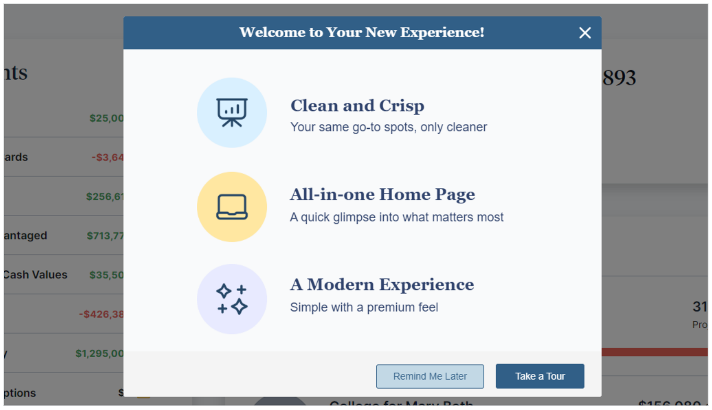
March 12 Launch

Advisor Communications:

- Email and Blog Post (If *My Advisor* page is being received, user experience directives will be included)
- March 28 Spring Feature Update Email and Release Notes
- In-app Message (If *My Advisor* page is being received, message will include a short product update video)

End-Client Communications:

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



For more information, please contact your eMoney primary point of contact.

**Communication promotional 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