**Subject line:** *Home Office News: Empowering Financial Wellness*

**Empowering Financial Wellness: How Client Portals Reduce Financial Anxiety and Transform Client Relationships**

Our 2023 Beyond the Plan research shows that financial advisors who address a client’s financial anxiety through incorporating actions based on financial psychology (finpsych) see greater client satisfaction. Furthermore, tech-forward advisors—those who embrace technology and believe it’s an important part of the client experience—see remarkably better outcomes.1

Learn More

**More Highlights**

**EMONEY NEWS**

[**Decision Center Wins FinTech Breakthrough Award**](https://emoneyadvisor.com/resources/news/emoneys-decision-center-wins-fintech-breakthrough-award/?elqTrackId=2270AEBD4A544DE9708D00A1575E58A9&elqTrack=true)

The Decision Center has been selected as the winner of the “Best Wealth Management Product” award in the eighth annual FinTech Breakthrough Awards program.

**CONNECTION UPDATE**

[**Your Guide to Data Aggregation**](https://content.emaplan.com/knowledgebase/Client-Facing-%20Your%20Guide%20to%20Data%20Aggregation.PDF?elqTrackId=9E58CFAC78D049B611A8DE9902578B4D&elqTrack=true)

Establishing and maintaining connections is critical to creating a seamless financial planning experience for your users. Since the start of the year, we’ve integrated 147 new sources, responding directly to top requested connections, including Navy Federal Credit Union, Allstate, Robinhood, and Betterment for Advisors.

**UPCOMING WEBINAR**

[**Planning with Emotional Intelligence Part 2**](https://response.emoneyadvisor.com/eMoney-May-2-CE-Webinar?elqTrackId=A77D54BCCC25536005A2F39357F1DE6F)

Discover the transformative potential of emotional intelligence (EI) in fostering meaningful connections between planners and clients. Join us on Thursday, May 2 at 2:00 p.m. ET as we delve into the intricate interplay between EI and holistic financial planning, backed by cutting-edge research and insights from eMoney.

*\*Note that Part 1 is not a pre-requisite, but if you'd like to check it out, you can do so*[*here*](https://response.emoneyadvisor.com/Dec_CE_Webinar?elqTrackId=80661A15AE90E743ED75B08D672A9B7A&elqTrack=true)*.*

**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.**

Sources:

1. eMoney, “Beyond the Plan” Research, July 2023