**94% of advisors say their clients are more satisfied because of eMoney**

Hi [Name],

Now that you’ve watched the What to Expectvideo, you’re ready to take the next step in your Getting Started Program: **scheduling a call with a Success Coach.** We’ll work with you on a strategy for implementing your planning platform that will help you:

* Grow your business
* Boost client satisfaction
* Plan more efficiently

**Coaching Call**

During your call with a Success Coach, we will:

* Review your onboarding plan to ensure you achieve your desired ROI
* Establish connections
* Establish advisor settings

Log into your planning platform and click *Training* to schedule your coaching call.

**Training**

In the meantime, log in to the Learning Center to begin the *Setup* courses to learn the foundation of eMoney – starting with **Settings Best Practices**. We recommend working through the Setup courses over the next 2 weeks.

**TIP**: Users who devote about an hour and a half of learning each week tend to see the best results! We recommend setting aside time for your learning over the next few months.

If you are interested in training or would like to delay until a later time, please contact us at onboarding@emoneyadvisor.com.