**Subject line:** Home Office News: Using Client Data to Personalize Financial Plans

**Using Client Data to Personalize Financial Plans**

Our research continues to support investors’ desire for personalized financial planning. Every client has unique goals, circumstances, and aspirations, and tailoring financial strategies to their specific needs is crucial for success.

[Learn More](https://emoneyadvisor.com/blog/using-client-data-to-personalize-financial-plans/?elqTrackId=41C5EBFEDD67295890D5670ADF49A3D1&elqTrack=true)

**More Highlights**

**HEART OF ADVICE PODCAST**

[**Personalization and the Niche Financial Planning Practice with Chloé Moore**](https://emoneyadvisor.com/blog/podcast-episode-5-personalization-and-the-niche-financial-planning-practice-with-chloe-moore/?elqTrackId=F1A8BDF224F4F2545D71491323988260)

In this Heart of Advice Podcast episode, we explore how effective discovery meetings can transform client-advisor relationships.

**PRODUCT UPDATE**

[**Passcodes on Mobile Devices**](https://blog.emoneyadvisor.com/heightened-security-at-sign-in/?elqTrackId=296D3CF8F07F490A2612EA1CF52B9790&elqTrack=true)

To maintain high security and align with industry standards, the passcode sign-in feature will no longer be available after September 24. Currently, the passcode feature enables advisors and their clients to log in to eMoney via mobile devices with a passcode instead of a username and password. Please note that users who use Single Sign-on to access the eMoney platform will not be impacted.

**PRODUCT UPDATE**

[**Screen Share Discontinuation**](https://blog.emoneyadvisor.com/screen-sharing-discontinuation/?elqTrackId=4E9C24A0313BD143C22F8DABEDB702B4&elqTrack=true)

To adapt to updated industry standards and due to low usage, the Screen Share

function will be discontinued in November. Present Mode, which protects

clients' information, will remain accessible.

Check out the [Heart of Advice blog](https://emoneyadvisor.com/blog/?elqTrackId=AC190DD33F36209CBBF3EF74FB893D06&elqTrack=true) for more insights and best practices for successful financial planning engagement.

**Check out the** [**Heart of Advice blog**](https://emoneyadvisor.com/blog/?elqTrackId=C035DCAC403573141ECA8742023DCAC5&elqTrack=true) **for more insights and best practices for successful financial planning engagement.**