**Subject line:** Home Office News: Tax Updates, Heart of Advice Podcast, and more

**New Heart of Advice Podcast**

Ever wish you had better insight into what it takes to be successful in financial planning? A brand-new eMoney podcast, Heart of Advice, features exclusive conversations with high-profile guests about what’s at the heart of it all—the advisor-client relationship.

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Ensure your financial plans reflect the most accurate and current information with the latest 2024 tax updates. State estate, inheritance, and income tax assumptions will be refreshed on May 30. These updates apply specifically to those utilizing the By State Rules tax settings, ensuring accuracy and compliance for tax calculations.

**BEST PRACTICE**

**Optimize Client Reviews with Technology and Finpsych**

Regular reviews are critical because financial planning is an ongoing process rather than a single end point. Here, we’ll discuss how you can leverage technology and financial psychology practices when you are preparing for and conducting mid-year or annual review meetings. Learn more about financial psychology here!

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Join us virtually October 21-23 and discover new ways to integrate powerful planning technology with human insight to deliver personalized, collaborative experiences that deepen client relationships and unlock the potential in your business.

Check out the Heart of Advice blog 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.**