**Subject line:** *Home Office News: Mid-year Product Recap*

**Mid-year eMoney Product Update Check-in**

In the first half of 2024, your eMoney experience has become more effective, efficient, and engaging. Watch the Mid-Year Check-In video to review some of the most impactful updates and new features released so far this year. Plus, see a sneak peek into features coming soon.

[Learn More](https://emoneyadvisor.wistia.com/medias/5f84ji0fl2?elqTrackId=D40FE0E35F2DDF3BC8C8430D3B8957A4&elqTrack=true)

**More Highlights**

**BEST PRACTICE**

[**Understanding the Common Barriers to Client Action**](https://emoneyadvisor.com/blog/understanding-the-common-barriers-to-client-action/?elqTrackId=76641D45E6CBC8F5949123995E1B3E2F)

Your goal is to help others achieve their financial goals. But your clients may be facing challenges that prevent them from seeking financial advice or implementing their financial plan. Discover seven common barriers to client action and get practical strategies for identifying when a client is facing them.

**HEART OF ADVICE PODCAST - EPISODE 3**

[**Fintech Plus Financial Psychology Equals Success with Greg Furer**](https://heart-of-advice.castos.com/episodes/fintech-plus-financial-psychology-equals-success-with-greg-furer?elqTrackId=AAAF32A844F803BB5D0E78ACEF7B4DB3&elqTrack=true)

This new episode explores how Beratung Advisors CEO Greg Furer, CFP® uses technology to streamline the financial planning process, enhance client communication, and scale his practice, which has experienced 600 percent AUM growth.

**2024 eMONEY SUMMIT**

[**Summit Registration is Open**](https://emoneyadvisor.com/summit/?elqTrackId=ADCCD96A2B388314A8AD0845C8264070)

We're excited to announce our two keynote speakers, Erica Dhawan and Roben Farzad, at this year's virtual eMoney Summit from October 21-23! Explore our lineup of industry experts and inspirational speakers ready to share their insights and inspire you to plan better together.

**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.**