**Subject line:** Home Office News: The Power of Collaborative Financial Planning

**The Power of Collaborative Financial Planning**

Our previous Evolution of Advice research laid the groundwork for understanding key client preferences for advice delivery and what tactics contributed most to client satisfaction. Our newest study, *Planning Better Together*, builds on these insights. This research highlights the top tech actions that you can implement as a forward-thinking advisor to foster a truly collaborative client experience.

[EXPLORE THE INSIGHTS](https://emoneyadvisor.com/blog/planning-better-together-the-power-of-collaborative-financial-planning/?elqTrackId=E5A5C1F2A281C81C3803F568401A0058&elqTrack=true)

**More Highlights**

**PRODUCT UPDATE**

[**Transfer Client Ownership with Intact Advisor Connections**](https://eng2e.seismic.com/i/ZS___cOSZ69FaRt7jt7uKAoL5OUhNi2FuS1fECnHacoVr0nZaq89T6WMDoGqqWPA8QjXvNxKMwNWzrarS7SVSWrJIXyO8DVSkLysPLUSSIGNof4k1AjGCudFqbhP6KXHnCsrVtkUy?elqTrackId=B836EE0D6EA7B9528A04E7490AF4FA1F)

In direct response to your requests, we have made transferring client ownership more seamless. Now, you can move multiple clients from one advisor to another, while keeping advisor connections intact.

**PRODUCT UPDATE**

[**Connection Status Report (CSR) Enhancements**](https://blog.emoneyadvisor.com/practice-management/2024-enhanced-connection-status-report-for-admin-users/?elqTrackId=EAAED46AA17E8B1B2C75246CA8B83533&elqTrack=true)

Easily identify when to support your advisors and their clients when data interruptions are identified using a new set of enhanced features now available in your Connections Status Report (CSR) for Admin users.

**ON-DEMAND WEBINAR**

[**From Accounts to Insights: Leveraging Data Aggregation for Firm Success**](https://emoneyadvisor.wistia.com/medias/v4o63vlxo2?wtime=0s&elqTrackId=D93D36F35E9D14B739A68561CAF031A8&elqTrack=true)

Watch our most recent webinar on demand and learn how effective data aggregation can enhance decision-making and client retention.

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.**