**Subject line:** Home Office News: Aggregation and Security Product Updates

**Heart of Advice Podcast: A Mindful and Tech-forward Approach to Planning with Eric Roberge**

How can you help clients find the right balance of saving for the future while enjoying their hard-earned wealth now? That’s the topic we’re diving into with our guest Eric Roberge, CFP®, the CEO of Beyond Your Hammock.

[Scale and Modernize the Client Experience](https://emoneyadvisor.com/blog/podcast-episode-6-a-mindful-and-tech-forward-approach-to-planning-with-eric-roberge/?elqTrackId=795D9B330F953E2D742B9990FDCEAFAF&elqTrack=true)

**Product Updates**

**PRODUCT UPDATE**

[**eMoney Aggregation - A Standalone Solution**](https://eng2e.seismic.com/i/ZS___cOSZ69FaRt7jt7uKAoL5OUhNi2FuS1fECnHacoVozrCvAH1oRD5sRC4FFhB7osEW6yWqPLUSSIGNal49GnTOcIPJTPLUSSIGNvpDawy6vTYnaqAe94cXwH25RmwYc2zPLUSSIGNPLUSSIGNrRYs0PLUSSIGNurg3?elqTrackId=FC405FD61DCA2A2585D320DD09DBFECC)

eMoney Aggregation is now available as a standalone solution, allowing your firm to power its own client experiences while leveraging our expertise and top-level support. [Learn more here](https://eng2e.seismic.com/i/ZS___cOSZ69FaRt7jt7uKAoL5OUhNi2FuS1fECnHacoVozrCvAH1oRD5sRC4FFhB7osEW6yWqPLUSSIGNal49GnTOcIPJTPLUSSIGNvpDawy6vTYnaqAe94cXwH25RmwYc2zPLUSSIGNPLUSSIGNrRYs0PLUSSIGNurg3?utm_campaign=CC_HO_Newsletter_September_2024&utm_medium=email&utm_source=Eloqua&elqTrackId=FC405FD61DCA2A2585D320DD09DBFECC&elq=f4307c470e124e9589f60bdfdf4b554e&elqaid=5268&elqat=1&elqCampaignId=&elqak=8AF52D4157AD2C136C120A303A7CC0DB9A5066A47BC8A2263E54AECEC3BE403F198F&elqTrack=true) or email enterprisesolutions@emoneyadvisor.com.

**CONNECTION UPDATE**

**Commitment to Connections: Q3 Update**

In the [2024 T3 Advisor Software Survey](https://blog.emoneyadvisor.com/wp-content/uploads/2024/04/2024-T3_Inside-Information-Software-Survey.pdf?elqTrackId=765FD504566F3C687CBA9FFCF7DECAB1&elqTrack=true), eMoney maintained its position as the top aggregation tool provider for the fourth consecutive year. We remain committed to delivering exceptional service, stability, and security. Since the start of the year, we’ve integrated 268 new sources, responding directly to top requested connections, including America First Credit Union, State Bankshares, WSFS, 1st Source, and more.

**To maintain high security and align with industry standards, we'll be making the following product updates:**

[**Passcodes on Mobile Devices**](https://blog.emoneyadvisor.com/heightened-security-at-sign-in/?elqTrackId=524F6CD95D1954E812F4ADE34EEB70D7&elqTrack=true)

The passcode sign in feature is no longer available starting **September 24**. 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.

[**Discontinued Cipher Suites**](https://blog.emoneyadvisor.com/product-updates/discontinued-cipher-suites-to-align-with-industry-standards-for-security/?elqTrackId=DE0D072D186878CF7F952FCE407DD9C3&elqTrack=true)

We will be retiring outdated cipher suites from our service on **October 7**. We don't anticipate this update impacting many of our users, but for good measure, please share this [list of discontinued and supported ciphers](https://blog.emoneyadvisor.com/product-updates/discontinued-cipher-suites-to-align-with-industry-standards-for-security/?elqTrackId=35E6EC7375DB12F779B6231962FD3EB3&elqTrack=true) with your IT team.

**Username Security Enhancement**

To enhance security, some advisor and client usernames will change in **mid-November**. Those impacted will receive a system-generated email with updated sign-on instructions. Users who could be affected by this update will receive advanced notice via email starting in early October. Rest assured your users' data remains safe and secure. For questions, please contact your eMoney point of contact.

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.**