**Subject line:** Home Office News: Build a Foundation That Motivates Clients to Action

**Build a Foundation That Motivates Clients to Action**

According to Self-determination Theory, when someone works towards a self-endorsed goal, motivated by values, interest, or enjoyment, their efforts are more likely to enhance their well-being. This is why helping your clients identify the goals that are meaningful to them is so important to the financial planning process.

[BUILD YOUR FOUNDATION](https://emoneyadvisor.com/blog/build-a-foundation-that-motivates-clients-to-action/?elqTrackId=763AA4C015F3A7F38473C644CF242B42&elqTrack=true)

**More Highlights**

**PRODUCT UPDATE**

[**2025 Terms of Use Update**](https://app.go.emoneyadvisor.com/e/er?s=225884627&lid=9437&elqak=8AF539F365884FC42DC4E3FB790B198118E5ADA067D6225A535E3048C70D9C311695&elqTrackId=0C0CD287DAC4F045CC941F2247E22EEE)

Starting on March 17, we’re updating our Terms of Use, which govern your use of our online products and services. After the update, all users will be prompted in the application to reacknowledge the terms when signing in. Check out the [summary of key updates](https://app.go.emoneyadvisor.com/e/er?s=225884627&lid=9437&elqak=8AF539F365884FC42DC4E3FB790B198118E5ADA067D6225A535E3048C70D9C311695&elqTrackId=A3EA1C7837E48C81D684F0497726820D) for more information.

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**THOUGHT LEADERSHIP**

[6 Things Firms Need to Know About AI in Aggregation](https://emoneyadvisor.com/blog/6-things-firms-need-to-know-about-ai-in-aggregation/?elqTrackId=8A94639388FA8BA692CEB24676EBDC98&elqTrack=true)

Account aggregation works entirely behind the scenes, but it has a very real and direct impact on both the advisor and client experience. With recent headlines in this space—data privacy lawsuits, regulatory updates, the uncertain future of widely adopted products—the emergence of AI in account aggregation is yet one more game-changing trend that firms must navigate.

**ON-DEMAND WEBINAR**

[Looking Back to Look Forward: A 2024 Recap](https://emoneyadvisor.com/resources/webinars/looking-back-to-look-forward-a-2024-recap/?elqTrackId=404E6EC4117F581AAC72BE38E3496A16&elqTrack=true)

Looking forward to a new year of financial planning? Join experts from the eMoney Financial Planning and Product leadership teams as they recap key research findings and feature developments from 2024. Discover what’s on the horizon for 2025 as eMoney continues to foster collaborative planning, empowering advisors to go beyond traditional approaches and better serve their clients.

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.**