**Subject line:** Home Office News: Three Keys to Building Stronger Relationships with Today’s Clients

**Three Keys to Building Stronger Relationships with Today’s Clients**

Fidelity’s 2024 Investor Insights Study reveals that Millennials, Gen Z, and Gen X seek services beyond traditional money management. Discover three key actions advisors can take to connect with these generations and build stronger relationships.

[EXPLORE THE INSIGHTS](https://emoneyadvisor.com/blog/three-keys-to-building-stronger-relationships-with-todays-clients/?elqTrackId=CD52390E42AE4DBBC4FA2A9579715EB1&elqTrack=true)

**More Highlights**

**PRODUCT UPDATE - COMING SOON**

[**Enhanced Security - New Multifactor Authentication**](https://blog.emoneyadvisor.com/enhanced-security-new-multifactor-authentication/?elqTrackId=67D6423D3C68BFAB8C5E4D9E76B9DA03&elqTrack=true)

Over the next few weeks, eMoney will be enhancing security measures with an improved multifactor authentication process, including self-recovery authentication and a new Help link for troubleshooting.

**Prior to this feature going live, please pass along this address to your IT team to whitelist \*.wealth.emaplan.com to avoid any interruptions.**

**PRODUCT UPDATE**

[**Introducing Plan Monitoring – A New Enterprise Add-on Solution**](https://eng2e.seismic.com/i/ZS___cOSZ69FaRt7jt7uKAoL5OUhNi2FuS1fECnHacoVre2IAN0CxCrZMps3PPcVK___sR0MNLVQsqL4qksO4vG8___2xZnXXmIv4vFOqbzQ1oqlmtkQ7XvyUXm7qNzBR9geki?elqTrackId=8076520EAAF047867061BB4D6263E858&elqTrack=true)

Plan Monitoring empowers advisors to effectively manage client relationships by enhancing plan quality and efficiency. Key features include Active Plan Indicator, Presentation Tracking, and Monthly Plan Snapshot. These features help track client goals, streamline presentation workflows, and provide valuable data insights for improved client engagement and data-driven decision-making.

**T3/INSIDE INFORMATION SURVEY**

Our clients provide invaluable feedback that informs our product roadmap and helps enhance the eMoney experience. With this in mind, we encourage all eMoney users to participate in the annual [**T3/Inside Information Survey**](https://www.surveymonkey.com/r/ZXZWH6L?elqTrackId=3C96B8C7AFA788791673A19BB463F3A7&elqTrack=true). We’re looking forward to seeing the results at the 2025 T3 Conference!

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.**