**Subject line:** Home Office News: Case Study: Achieving Engagement and Retention Goals Through Collaborative Planning

**Case Study: Achieving Engagement and Retention Goals Through Collaborative Planning**

Want to build stronger client relationships? This case study includes best practices on using eMoney to strengthen your relationships through collaboration.

These strategic actions helped the firm grow from **$60M to $310M AUM** and increase client retention from **75% to 95%** since becoming an eMoney client.

[REVIEW THE CASE STUDY](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_March_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9448&elqTrackId=BC6E5A2397FD78656C16511B9291D494&elq=20481a4509974d509212bd0284955642&elqaid=5635&elqat=1&elqak=8AF59C270B27DB0A672AA8BA30B167095F39150885BEA1D1278EC79C738198D681F3)

**More Highlights**

**NEWS**

[eMoney Advisor Names Christian Solomine as Head of Sales](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_March_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9474&elqTrackId=F5A25E8B0B88E5B9B31DB1065B87AFFC&elq=20481a4509974d509212bd0284955642&elqaid=5635&elqat=1&elqak=8AF5A5954A368BCFAB6F470C86A24BC1032C150885BEA1D1278EC79C738198D681F3)

We're excited to announce that as of March 4, 2025, Christian Solomine has been named the organization’s Head of Sales and has joined its Core Leadership Team. Bringing over 20 years of experience leading sales and marketing teams for SaaS companies, Christian will offer valuable insights to our business while improving sales efficiencies, strengthening client relationships, and driving growth.

**VIDEO**

[5 Key Collaborative Activities to Enhance Client Relationships](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_March_2025&utm_medium=email&utm_source=Eloqua&utm_campaign=CC_L1_Best_Practices_March_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9485&elqTrackId=53916C06A15F411EF9B4FE1AB4D6C8F6&elqTrack=true&elq=20481a4509974d509212bd0284955642&elqaid=5635&elqat=1&elqak=8AF598688A88BE714E715714810457E852C2150885BEA1D1278EC79C738198D681F3)

In this video, Emily Koochel, PhD, AFC®, CFT™, shares five key collaborative activities to help you create a more transparent, dynamic, and engaging planning experience.

**BLOG**

[Crafting A Client Retention Strategy: Best Practices for Financial Planners](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_HO_Newsletter_March_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9413&elqTrackId=B9CC87828E21319DEA15E93B6472AC2F&elq=20481a4509974d509212bd0284955642&elqaid=5635&elqat=1&elqak=8AF5C77BCD7E396F21E99DB4FDB5DBFAA019150885BEA1D1278EC79C738198D681F3)

The tips and tactics in this blog will help you craft a comprehensive client retention strategy that focuses on three key areas: client experience, communication, and client appreciation.

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.**