**Subject Line:** Introducing: NEW Needs Analysis

**Engage Clients with Ease: The New Needs Analysis**

Enable focused single-goal conversations while providing a quick and easy way to help clients make impactful, informed decisions with the **new Needs Analysis.**

[**LEARN MORE**](https://blog.emoneyadvisor.com/emoney-updates-q1-2025/)

**The Premium Client Portal—Coming March 31!**

Boost client engagement, foster deeper collaboration, and drive business growth with the **Premium Client Portal**, designed with **new features and a mobile app** to enhance your client experience!

Want to learn how to improve your client experience through the Client Portal and learn more about Premium Client Portal? [**Join the live webinar on April 8 from 2:00 – 3:00 p.m. ET**](https://emoneyadvisor.com/resources/webinars/improving-client-engagement-and-satisfaction-through-the-client-portal/) to explore how these features can deepen relationships, expand your client base, and create a more collaborative planning experience. [**Learn More**](https://blog.emoneyadvisor.com/emoney-updates-q1-2025/#Premium-Client-Portal)

**Other Impactful Updates**

**NOW AVAILABLE**

**Knowledge Base Navigator**

Accessing resources is easier than ever! The Knowledge Base Navigator quickly delivers answers from our full resource library—no waiting for support. [**Learn More**](https://blog.emoneyadvisor.com/emoney-updates-q1-2025/#Knowledge-Base-Navigator)

**NOW AVAILABLE**

**Single Sign-on to Vanilla**

Enhance efficiency with seamless Vanilla access via single sign-on (SSO). Enable it to streamline tasks and access Vanilla instantly from the Integrations tab. [**Learn More**](https://blog.emoneyadvisor.com/emoney-updates-q1-2025/#Vanilla)

**COMING SOON**

**Estate Flow Charts Enhancements**

The Estate Flow Chart and Detailed Estate Flow Chart reports will feature improved aesthetics and readability, aligning with our enhanced reports.

[**Learn More**](https://blog.emoneyadvisor.com/emoney-updates-q1-2025/#Estate-Flow-Chart)

[**SEE ALL PRODUCT UPDATES**](https://blog.emoneyadvisor.com/emoney-updates-q1-2025/)

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