**Subject line:** Introducing the mobile app to clients

Hi FirstName,

Now that you've hopefully turned on your Premium Client Portal features for your clients, it's time to **introduce them to the mobile app, if applicable.**

**How to Help Your Clients Download the Mobile App**

1. Once signed in to eMoney, click ***Help***from your navigation bar, and then click ***All Help.***
2. Below the resource category, *Client-Facing - Premium Client Portal*, click the guide, ***Download the Mobile App.***

TAKE ME TO THE MOBILE APP GUIDE

EMAIL TEMPLATE

**Encouraging Client Engagement with Their Portal**

Encouraging adoption of the client portal and new mobile app is a worthwhile investment. Getting clients to use their portal consistently:

* fosters trust
* strengthens advisor relationships
* motivates them toward their financial goals1.

Take a look at **this email template** which you can use as-is or as a framework to promote portal engagement.

**About This Email Series**

You can expect emails like this one over the next two months which will include guidance, tips, and best practices to help you make the most of your Premium Client Portal. Our goal is to help streamline the process in **strengthening your client engagement.**

Note: If you have a unique version of Premium Client Portal via an enterprise affiliation, it is possible you may not have access to every feature referenced.