**Subject line:** Tips for Increasing Client Portal Use

Hi FirstName,

Now that you've hopefully turned on your Premium Client Portal features for your clients and introduced them to [**the mobile app**](https://response.emoneyadvisor.com/mobile-app-email-communication?utm_campaign=CC_Premium_Client_Portal_Adoption_Series_3&utm_medium=email&utm_source=Eloqua&elqTrackId=AC46F84F1AE16DBB6408F2A29B0CD67D&elq=3e3781035ff7475f88d275901d2dbcfe&elqaid=5564&elqat=1&elqCampaignId=&elqak=8AF5663F3A0BCCAABD918FE2E3DCBECC333A6EE5A29BB4604BBDA5A50E9FDEC02725), it's time to brush up on some**best practices for increasing client engagement.**

[**On-demand Webinar: Improving Client Engagement and Satisfaction Through the Client Portal**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_Premium_Client_Portal_Adoption_Series_3&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9412&elqTrackId=6EF3C0823D8577E9630F3325E3D2A3AD&elq=3e3781035ff7475f88d275901d2dbcfe&elqaid=5564&elqat=1&elqak=8AF5FDB71932E9A2C5410F1A2C18A9AF5EFA6EE5A29BB4604BBDA5A50E9FDEC02725)

Join Emily Koochel, PhD, AFC®, CFT-I™, BFA™, Manager of Financial Wellness and Chris Grant, Group Product Manager at eMoney for this engaging on-demand webinar where **you'll learn how to:**

* **deepen existing client relationships**
* **expand your client base**
* **create a more personalized and collaborative client experience**
* **get clients excited** about engaging with a client portal to improve their satisfaction.

[WATCH THE ON-DEMAND WEBINAR](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_Premium_Client_Portal_Adoption_Series_3&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9412&elqTrackId=0D8EB3E48FA880FD4C1C946E1B40A295&elq=3e3781035ff7475f88d275901d2dbcfe&elqaid=5564&elqat=1&elqak=8AF554D15F4806C145FC1D54EA41A31034266EE5A29BB4604BBDA5A50E9FDEC02725)

BLOG

[**A How-to Guide for Client Portal Engagement**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_Premium_Client_Portal_Adoption_Series_3&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9097&elqTrackId=2B1619B711A3071946023C2F020BC30B&elq=3e3781035ff7475f88d275901d2dbcfe&elqaid=5564&elqat=1&elqak=8AF511FC99B08A4E49A134EFAD34B85CA90E6EE5A29BB4604BBDA5A50E9FDEC02725)

Introducing new technology and ensuring client engagement can be daunting. Achieving widespread client portal adoption requires a strategic and personalized approach. Learn some strategic tips for effectively rolling out the portal to your clients to streamline processes, enhance collaboration, and ultimately deliver a superior client experience.

EMAIL TEMPLATE

**Encouraging Client Portal Engagement**

If you haven't yet, take a look at [**this email template**](https://response.emoneyadvisor.com/mobile-app-email-communication?utm_campaign=CC_Premium_Client_Portal_Adoption_Series_3&utm_medium=email&utm_source=Eloqua&elqTrackId=A5EC6089A321CB215A41DE5BE7C5C60D&elq=3e3781035ff7475f88d275901d2dbcfe&elqaid=5564&elqat=1&elqCampaignId=&elqak=8AF51A1EB7459A15AEB50D83FEC37345087C6EE5A29BB4604BBDA5A50E9FDEC02725) 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.