**Subject line:** A reliable workflow for immediate client portal engagement

Hi FirstName,

Now that you've hopefully turned on your Premium Client Portal features and introduced your clients to **the mobile app**, take a few moments to consider **a reliable workflow for immediate client engagement.**

**eBook: How Combining Technology and Financial Psychology Transforms Client Outcomes**

[Tech-forward advisors, specifically those who use a client portal and believe technology is an important part of the client experience, see remarkably better outcomes than tech-averse advisors in at least eight measurable categories. **Page 13 of this eBook outlines a reliable workflow for immediate engagement in five steps.**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_Premium_Client_Portal_Adoption_Series_4&utm_medium=email&utm_source=Eloqua&s=225884627&lid=8182&elqTrackId=5517A4DD071372BDF31415918A0C6942&elq=c98fa382841c4ab295fc1569e84c62dd&elqaid=5566&elqat=1&elqak=8AF56C2475E5B0C6B6E17C993FFEA7010EAAB32DA8999CB3FD3F60CBAA36E7153DE9)

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ON-DEMAND WEBINAR

**How Combining Technology and Financial Psychology Transforms Client Outcomes**

[When financial anxiety decreases, trust, loyalty, and overall client satisfaction increase. The client portal is a helpful tool to accomplish this](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_Premium_Client_Portal_Adoption_Series_4&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9097&elqTrackId=2B1619B711A3071946023C2F020BC30B&elq=c98fa382841c4ab295fc1569e84c62dd&elqaid=5566&elqat=1&elqak=8AF54A408FE5812E6CF85EEB7D2FAC98776FB32DA8999CB3FD3F60CBAA36E7153DE9). Learn how to employ a strategy that combines financial technology with psychological insights to improve your bottom line and enrich your client engagement and planning experience. During this on-demand webinar, you'll **walk through how to use the Client Portal in a way that aligns with the finpsych best practices**included in the eBook above.

**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.