**Subject line:** Home Office News: Data Migration Services Help Migrate Platforms with Ease

**Case Study: Data Migration Services Help Migrate Platforms with Ease**

Looking to streamline your firm's data collection process and improve financial advice? See how Bridgeworth Wealth Management successfully transitioned their financial planning data to eMoney, ensuring a smooth migration process with minimal disruption.

[REVIEW THE CASE STUDY](https://emoneyadvisor.com/resources/case-studies/data-entry-services-help-migrate-platforms-with-ease/)

**More Highlights**

**PRODUCT UPDATE**

**Continuing to Modernize the Client Experience**

As we work hard to improve the experience of Client Portal users, a few remaining pages have been visually enhanced to align with last year's modernization of the Portal's design. These enhancements are purely aesthetic with no functional changes. Feel confident in engaging your clients with a consistent, modern digital experience that fosters trust and helps your business grow.

**PRODUCT UPDATE**

**Notice Regarding Federal Student Loan Data Aggregation**

Due to the Stop Student Debt Relief Scams Act (STOP Act), financial data for federal student loans can no longer be connected or updated through any financial data aggregator. All previously aggregated or input data will remain but will no longer be updated automatically. Users can manually input federal student loan account details to ensure these sources are included in their full financial picture. This change affects federal student loan providers only; private student loan providers are not impacted. We appreciate your understanding and remain committed to providing a compliant, secure, and reliable data aggregation service.

**BLOG**

[**Elevate Your Practice: The Power of Client Portals in Financial Planning**](https://emoneyadvisor.com/blog/elevate-your-practice-the-power-of-client-portals-in-financial-planning/?elqTrackId=8056517CF97E26D82789CE9C9730F84B&elqTrack=true)

In the competitive world of financial planning, staying ahead means leveraging technology to empower both you and your clients. Client portals have emerged as a cornerstone in modern financial advice, enabling more meaningful conversations and transformative planning outcomes.

**BLOG**

[**How Financial Planners Can Get Started with AI Today**](https://emoneyadvisor.com/blog/how-financial-planners-can-get-started-with-ai-today/?elqTrackId=CF67F05DED4A156C3CF7049F410DFFC2&elqTrack=true)

The financial services landscape is beginning to feel the impact of advancements in artificial intelligence (AI) and machine learning technologies. Many believe AI has the potential to influence how financial planners operate, offering unprecedented opportunities for efficiency, personalization, and data-driven insights.

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.