**Subject line:** Home Office News: Motivating Clients to Act

**Motivating Clients to Act**

Do your clients know what they need to do, but still struggle to take action? Even when a financial plan is in place, clients can hesitate. This guide explores how to shift from giving advice to inspiring action. Learn practical strategies to help clients overcome hesitation, clarify their goals, and feel confident moving forward.

[TURN PLANNING INTO PROGRESS](https://emoney.seismic.com/app?ContentId=4d2f0c53-884a-4604-9201-d29f37df9fbd&elqTrackId=97DDBDD3E0F5D77E1D90C56F8BA868CA&elqTrack=true#/doccenter/f0df1be0-a572-401d-a8ab-36a5c6ded059/doc/%252Fddfa692c0f-5361-4411-8133-046e994bf35f%252FdfY2ZkNWIxNWEtZDYwYy00YWQ4LTkzZjAtZWNkMGRhODY4ZTYy%252CPT0%253D%252CQ2xpZW50IEV4cGVyaWVuY2U%253D%252Flf34567b03-8831-4d48-9e64-46cb231d8a18/grid/)

**More Highlights**

**PRODUCT UPDATE**

[Coming in July: Client Portal Improvements and Discontinuations for an Enhanced Client Experience](https://blog.emoneyadvisor.com/practice-management/coming-in-july-client-portal-improvements-and-discontinuations-for-an-enhanced-experience/?elqTrackId=885B87F87D05F17BF1D968D632AC9671&elqTrack=true)

Our product strategy focuses on continuously investing in the Client Portal to benefit advisors and their clients. We’re enhancing capabilities, building new features, and removing outdated technology to deliver modern, efficient tools that improve client engagement and help grow your business.

**PRODUCT UPDATE**

[Sharing Rules Enhancement in the Admin Tool](https://blog.emoneyadvisor.com/sharing-rules-enhancement-in-the-admin-tool/?elqTrackId=525D8819ECBE46E75EB76AF45E8FC1F4&elqTrack=true)

Administrators can now efficiently manage Sharing Rules directly within the Admin Tool, reducing the time required to onboard new users and improving workflow efficiency.

**PRODUCT UPDATE**

2025 State Estate & Inheritance Tax and Annual State Income Tax Updates

Ensure your financial plans reflect the most accurate and current information with the latest 2025 tax updates. State estate, inheritance, and income tax assumptions are now refreshed. These updates apply specifically to those utilizing the By State Rules tax settings, ensuring accuracy and compliance for their tax calculations.

**PODCAST**

[Advisor Chat: Collaborative and Comprehensive Planning](https://emoneyadvisor.com/knowledge-base-podcast/podcast/advisor-chat-collaborative-and-comprehensive-planning/?elqTrackId=C957703C867B829E623C25D624E93710&elqTrack=true)

In this episode of our *Knowledge Base Podcast*, Ryan Coburn, CFP® of Atlas Private Wealth Advisors, shares how he uses eMoney for comprehensive financial planning and creating a collaborative, engaging client experience.

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.