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| |  |  |  |  |  | | --- | --- | --- | --- | --- | | |  |  |  |  | | --- | --- | --- | --- | | |  | | --- | | **PODCAST**  [**Podcast Episode #9: Values-aligned Investing with Max Mintz**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_Best%20Practices_January_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9353&elqTrackId=179DAC09FBB37F349E22A868C65C3922&elq=31035ed8145d40508529f13c99df7919&elqaid=5514&elqat=1&elqak=8AF51B9C4D57C68930B013D39094C333EF6DB8072717ED7CCCDA859488D74088C58D)  [Max Mintz returns to the podcast to discuss a very popular topic among financial professionals: sustainable investing, and how to combine financial returns with philanthropic impact](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_Best%20Practices_January_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9353&elqTrackId=1DF7EB482496B1345E0AA67A6949C657&elq=31035ed8145d40508529f13c99df7919&elqaid=5514&elqat=1&elqak=8AF51704D15713D8EE682F363DB804261841B8072717ED7CCCDA859488D74088C58D). | | **BLOG**  [**Three Keys to Building Stronger Relationships with Today’s Clients**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_Best%20Practices_January_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9343&elqTrackId=CD52390E42AE4DBBC4FA2A9579715EB1&elq=31035ed8145d40508529f13c99df7919&elqaid=5514&elqat=1&elqak=8AF56703CAAC107A4299FBE16A79CCDD1539B8072717ED7CCCDA859488D74088C58D)Fidelity’s 2024 Investor Insights Study reveals that Millennials, Gen Z, and Gen X seek services beyond traditional money management. Discover three key actions advisors can take to connect with these generations and build stronger relationships. | | **CASE STUDY**  [**A How-to Guide for Client Portal Engagement**](https://emoneyadvisor.com/resources/case-studies/embracing-collaboration-with-emoney/?utm_campaign=CC_Best%20Practices_January_2025&utm_medium=email&utm_source=Eloqua&elqTrackId=C8FC555785C305BE7C4BA091B9C32E94&elq=31035ed8145d40508529f13c99df7919&elqaid=5514&elqat=1&elqCampaignId=&elqak=8AF5DFD6190A646BA6ED878C27BBA469A2B4B8072717ED7CCCDA859488D74088C58D)  R&R Wealth Management uses eMoney to facilitate in-depth, interactive discussions with their clients about their goals, ambitions, and other emotionally impactful issues. | | | |