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| |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  | | --- | --- | --- | --- | --- | | |  | | --- | | **ON-DEMAND WEBINAR**  [**Improving Client Engagement and Satisfaction Through the Client Portal**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_L1_Best_Practices_May_2025_A&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9412&elqTrackId=62DBDA9C5035F33E01E1929DF9A1A8B3&elq=a13984512a0a4d02a3ccb6d8aaac3b59&elqaid=5698&elqat=1&elqak=8AF5D38A073BCE43E0A4F11B7DFCD5385D1EEE39D8FA57B2CB10B269C341567259F0)  [Clients expect technology to be central to their financial planning, enhancing accessibility and communication. Watch this on-demand webinar to discover how a client portal drives satisfaction and strengthens relationships](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_L1_Best_Practices_May_2025_A&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9353&elqTrackId=1DF7EB482496B1345E0AA67A6949C657&elq=a13984512a0a4d02a3ccb6d8aaac3b59&elqaid=5698&elqat=1&elqak=8AF51D47A4056C4EE583EADBB3CCAB2B28CCEE39D8FA57B2CB10B269C341567259F0). | | **BLOG**  [**Driving Client Motivation Through Accountability Strategies**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_L1_Best_Practices_May_2025_A&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9597&elqTrackId=964DAEE5F130DE7DDA85B149D5835875&elq=a13984512a0a4d02a3ccb6d8aaac3b59&elqaid=5698&elqat=1&elqak=8AF5CB30CC251421F960CD40A82B008802A7EE39D8FA57B2CB10B269C341567259F0)  Nurturing client motivation strengthens relationships and improves financial outcomes. By aligning plans with clients’ values and goals, you boost success and long-term commitment. | | **PODCAST**  [**Advisor Chat: Collaborative and Comprehensive Planning**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_L1_Best_Practices_May_2025_A&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9599&elqTrackId=A6E2F5F4E04DF46603BB735F552B4ABD&elq=a13984512a0a4d02a3ccb6d8aaac3b59&elqaid=5698&elqat=1&elqak=8AF58CBCDC5284D066F94790ED174E5C8A91EE39D8FA57B2CB10B269C341567259F0)  In this episode, Ryan Coburn, CFP® of Atlas Private Wealth Advisors, shares how he uses eMoney for comprehensive financial planning and creating a collaborative, engaging client experience. Learn more in this *Knowledge Base Podcast.* | | **LINKEDIN**  [**Asking Your Clients Thoughtful Questions**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_L1_Best_Practices_May_2025_A&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9598&elqTrackId=3AC56CDE769AD647A09CA5F35EFCB704&elq=a13984512a0a4d02a3ccb6d8aaac3b59&elqaid=5698&elqat=1&elqak=8AF52183318D4CA9A88EAE8BF84BB8AB0129EE39D8FA57B2CB10B269C341567259F0)  What are some of the top questions you ask clients to prompt a meaningful conversation? Share in the comments! | | | |