**Subject Line:** Identify Insurance Gaps with Confidence

**Life Insurance Now in Needs Analysis**

Explore the new Needs Analysis, now with our most-used classic topic—Life Insurance Gap Analysis—and more tools to help you uncover client needs in minutes.

[**LEARN MORE**](https://blog.emoneyadvisor.com/emoney-updates-q2-2025/#Life-Insurance-Now-in-Needs-Analysis)

**A LOOK BACK AT Q1**

**#1 Market Leader in Aggregation Tools​**

As the leader of aggregation tools in the market, we are committed to helping you unlock opportunities to grow your business by providing you a holistic view of your clients’ data to enhance personalized financial planning. [**Learn more.**](https://blog.emoneyadvisor.com/emoney-updates-q2-2025/#Aggregation-Tools)

**NOW AVAILABLE**

**Schwab Integration Enhancements**

The Schwab integration unlocks faster, more efficient document sharing by enabling seamless access to Schwab statements directly within the Client Vault. [**Learn more.**](https://blog.emoneyadvisor.com/emoney-updates-q2-2025/#Schwab-Integration-Enhancements)

[**SEE ALL PRODUCT UPDATES**](https://blog.emoneyadvisor.com/emoney-updates-q2-2025/)

**Aggregation Update: Federal Student Loans**

Due to the Stop Student Debt Relief Scams Act (STOP Act), financial data for federal student loans can no longer be accessed by third parties. To comply with this regulation, eMoney will discontinue access to federal student loan financial data effective **Friday, April 18, 2025.** [**Learn More.**](https://blog.emoneyadvisor.com/emoney-updates-q2-2025/#Federal-Student-Loans)