**Subject line:** Client Portal Updates Coming This July

Hi ﻿FirstName﻿,

As we strive to make our platform more engaging, efficient, and intelligent, we are renewing our focus on the end-client experience. We’re enhancing capabilities, building new features, and removing outdated technology to deliver modern, efficient tools that improve client engagement and help grow your business.

* **Goals Sunsetting**|The Client Portal *Goals*tab will be disabled and replaced with our award-winning My Plan, representing clients’ goals and more.
* **Explore Mode and Workshops Sunsetting** | On July 15, we will be sunsetting both *Explore Mode* and *Workshops*.

We look forward to continuing to be your partners in achieving strong client engagement.

**Prepare Your Clients for the New Experience**

**Want to help your clients navigate the upcoming changes?** We’ve created a customizable email template to help you communicate the upcoming Client Portal discontinuations and enhancements. It’s a simple way to ensure your clients understand what’s changing—and why it matters—so they feel confident and supported throughout the transition.

[VIEW TEMPLATE](https://emoneyadvisor.com/communications-resource-center/client-portal-updates-july-2025-end-client-email-template/)

**My Plan in the Client Portal**

Bring financial plans to life with MyPlan, a tab within the Client Portal that transforms financial planning into an interactive and engaging experience.

[Enable My Plan Today](https://content.emaplan.com/Knowledgebase/interactive/Managing%20the%20Client%20Website/)