**Subject Line:** 91% of advisors said they generated value by improving client engagement since using eMoney

Hi ﻿FirstName﻿,

This month, we're focusing on a popular topic: **strengthening client engagement through financial psychology.**

[**How Combining Technology and Financial Psychology Transforms Client Outcomes**](https://emoneyadvisor.com/wp-content/uploads/2024/01/eBook_combining-technology-and-financial-psychology_Final.pdf)

This eBook explores how tech-forward practices using financial psychology can enhance client relationships and drive better outcomes.

**Note: Don't miss page 13** of this eBook for a reliable workflow for immediate client engagement to help make these findings actionable!

[**Learn More About Combining Technology and Financial Psychology**](Learn%20More%20About%20Combining%20Technology%20and%20Financial%20Psychology)

**More Content on Financial Psychology**

**BLOG**

[**Understanding the Psychology of Referrals in Financial Planning**](https://emoneyadvisor.com/blog/understanding-the-psychology-of-referrals-in-financial-planning/)

Client referrals are crucial for growing your practice. Understand what motivates referrals to create a successful strategy.

**PODCAST**

[**Making Financial Planning More Repeatable Without Losing The Customization Where Clients Prioritize What Matters Most**](https://www.kitces.com/blog/michelle-underwood-gass-ideal-client-plan-meeting-process-structure-financial-plan-workflow-management/)

Michael Kitces, a past Summit Keynote Speaker, dives into an eMoney client's unique five-part planning process, which balances efficiency with a deeply personalized approach to client relationships.

**BLOG**

[**What Is Financial Psychology and How Can Financial Advisors Use It?**](https://emoneyadvisor.com/blog/what-is-financial-psychology-and-how-can-financial-advisors-use-it/)

Financial psychology is a crucial yet often overlooked aspect of financial planning, and this post explores how understanding clients' financial attitudes can enhance advice and outcomes.

**SOCIAL VIDEO**

[**Understanding the Psychology of Referrals in Financial Planning**](https://www.linkedin.com/feed/update/urn:li:activity:7297613528830496770)

This short video shares how understanding the psychology behind referrals can make them a natural and powerful part of your practice. Do you have any customers who came to you through a client referral? If so, what do you attribute that referral to? **Share your response in the comments of the video!**