**Subject line:** 79% of advisors said eMoney has excellent collaborative planning capabilities

Hi ﻿FirstName﻿,

Want to build stronger client relationships? This month's newsletter includes best practices on using eMoney to **strengthen your relationships through collaboration.**

[**Achieving Engagement and Retention Goals Through Collaborative Planning**](https://emoneyadvisor.com/resources/case-studies/achieving-engagement-and-retention-goals-through-collaborative-planning/)

See how Waverly Advisors fosters collaboration and holistic planning using the intuitive tools and data visualization in eMoney to enhance communication, engage clients, and build lasting relationships.

By leveraging eMoney, the Waverly team:

* **Streamlined collaboration** on a broad range of financial topics
* **Enabled secure data sharing** via the eMoney Vault and account aggregation
* **Used Decision Center** to illustrate the impact of financial decisions
* **Incorporated digital check-ins** through the Client Portal for real-time engagement
* **Personalized client experiences** with curated reports tailored to individual needs

These strategic actions helped the firm grow from **$60M to $310M AUM** and increase client retention from **75% to 95%** since becoming an eMoney client.

[**REVIEW THE CASE STUDY**](https://emoneyadvisor.com/resources/case-studies/achieving-engagement-and-retention-goals-through-collaborative-planning/)

**More Content on Building Stronger Client Engagement**

**BLOG**

**[Mastering Difficult Conversations: Tips for Delivering Bad News to Clients](https://emoneyadvisor.com/blog/mastering-difficult-conversations-tips-for-delivering-bad-news-to-clients/" \t "_blank)**

Delivering bad news is inevitable in financial planning. With the following tips, you can navigate these difficult conversations with confidence while maintaining your clients’ trust.

**LINKEDIN VIDEO**

[**5 Key Collaborative Activities to Enhance Client Relationships**](https://www.linkedin.com/posts/emoney-advisor_planning-better-together-activity-7307445646771335168-_ggB/)

In this video, Emily Koochel, PhD, AFC®, CFT™, shares five key collaborative activities to help you create a more transparent, dynamic, and engaging planning experience.

**BLOG**

[**Crafting A Client Retention Strategy: Best Practices for Financial Planners**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_L1_Best_Practices_March_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=9413&elqTrackId=7A058918568DCBCACF133B4EDC5FA142&elq=0312f3b58fe34f56aebf12d9e0ad9953&elqaid=5604&elqat=1&elqak=8AF5E6F3F194629531249F0724E47705E1A7DD137648E36E87253E0387C63C5AC9B4)

The tips and tactics in this blog will help you craft a comprehensive client retention strategy that focuses on three key areas: client experience, communication, and client appreciation.

**LIVE TRAINING**

[**NEW Did You Know Series**](https://app.go.emoneyadvisor.com/e/er?utm_campaign=CC_L1_Best_Practices_March_2025&utm_medium=email&utm_source=Eloqua&s=225884627&lid=2606&elqTrackId=5D7924B43646293A9FD79ADE571A7074&elq=0312f3b58fe34f56aebf12d9e0ad9953&elqaid=5604&elqat=1&elqak=8AF56ED55238BF1B7C199DA7F1395B2C1732DD137648E36E87253E0387C63C5AC9B4)

Join us on **Tuesday, March 25, at 2:00 p.m. ET** and explore key tools and features in eMoney that streamline data gathering, enhance communication, and improve client engagement. To enroll, click *Training*, and locate the *“Did You Know Series – Webinars”* section in your Course Catalog.

\*Should the webinar reach maximum capacity, an additional session will be planned for a future date\*

**Upcoming Live Webinar**

**APRIL 8th at 2:00PM**

[**Improving Client Engagement and Satisfaction Through the Client Portal**](https://emoneyadvisor.com/resources/webinars/improving-client-engagement-and-satisfaction-through-the-client-portal/)

**This webinar session is for you if you're looking to:**

* Deepen existing client relationships and expand your client base
* Create a more personalized and collaborative client experience
* Get clients excited about engaging with a client portal and improving their satisfaction
* Take your client experience to the next level with Premium Client Portal.

**Timely Deadlines**

* **April 1** - The deadline for taking the first Required Minimum Distribution (RMD) for those who turned 73 in 2024.
* **April 15** - The deadline for Federal income tax filing.