**Subject line:** Home Office News: Balancing Empathy and Technology in Financial Planning

**Balancing Empathy and Technology in Financial Planning with Patti Brennan**

**This year marks eMoney’s 25th anniversary**—and we’re celebrating by sharing stories that reflect the heart of advice. In celebration of 25 years, check out this inspiring podcast episode featuring Patti Brennan, CFP®, CFS, CEO of Key Financial Inc. From her early days as a nurse to becoming a leader in wealth management, Patti shares how empathy, innovation, and a deep understanding of her clients' lives helped shape her approach to planning. As we look ahead to the future of advice, this conversation reminds us what’s always been at the center: people.

[LISTEN TO THE EPISODE](https://heart-of-advice.castos.com/episodes/balancing-empathy-and-technology-in-financial-planning-with-patti-brennan)

**More Highlights**

**PRODUCT UPDATE**

[**Coming July 2025: Client Portal Improvements and Discontinuations for an Enhanced Experience**](https://blog.emoneyadvisor.com/practice-management/coming-in-july-client-portal-improvements-and-discontinuations-for-an-enhanced-experience/)

We’re investing in the future of the Client Portal with enhanced capabilities, new features, and the retirement of outdated tools—delivering a more modern, efficient experience for advisors and their clients.

**TIMELINE**

**[A Look Back at Our Journey](https://emoneyadvisor.com/about/25th-anniversary-timeline/%22%20%5Ct%20%22_blank)**

Take a visual stroll through our 25-year timeline—highlighting the innovations, milestones, and moments that matter.

**SUMMIT**

[**eMoney Summit Agenda is Live**](https://emoneyadvisor.com/summit/schedule/)

Registration is officially open and the agenda is live for the virtual 2025 eMoney Summit, happening October 20-22! This year’s theme, *Tomorrow’s Planning, Today*, celebrates 25 years of innovation and the continued evolution of financial planning.

Check out the [Heart of Advice blog](https://emoneyadvisor.com/blog/?elqTrackId=AC190DD33F36209CBBF3EF74FB893D06&elqTrack=true) for more insights and best practices for successful financial planning engagement.