|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|

|  |  |  |
| --- | --- | --- |
|

|  |  |
| --- | --- |
|

|  |
| --- |
| If you are having trouble reading this email, [read the online version](https://app.go.emoneyadvisor.com/e/es?s=225884627&e=275098&elqTrackId=64bbcdbe8888401c830844e2f7189fd5&elq=0bcf4bb7401141f2968a034061eb29f7&elqaid=5953&elqat=1&elqak=8AF571534296A0BB9F1900DC144D7FD5ECA76B9B2E201CA47F60486AE5DEF50A8594). |

 |

 |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|

|  |  |  |  |
| --- | --- | --- | --- |
|

|  |
| --- |
| eMoney |
| Best Practices Newsletter |
| Hi Sabrina,How can financial professionals balance the need for maintaining accurate client data with the time and cost constraints that often accompany this process?In this month's newsletter, we round up **5 impactful resources to help inspire improvement around data collection, onboarding, and tools to help along the way.** |

 |

 |

 |

|  |  |  |  |
| --- | --- | --- | --- |
|

|  |  |  |
| --- | --- | --- |
|

|  |  |
| --- | --- |
|

|  |
| --- |
| **BLOG****[What If Client Data Collection Didn't Have to Be a Headache?](https://emoneyadvisor.com/blog/financial-fact-finding-workflows-to-kickstart-planning-relationships/%22%20%5Ct%20%22_blank)**Client data collection is one of the most frustrating parts of financial planning—slow, manual, and often error-prone. Learn two workflows... [**Read More >**](https://emoneyadvisor.com/blog/financial-fact-finding-workflows-to-kickstart-planning-relationships/) |

 |

 |

 |

|  |  |  |  |
| --- | --- | --- | --- |
|

|  |  |  |
| --- | --- | --- |
|

|  |  |
| --- | --- |
|

|  |
| --- |
| **1-MINUTE VIDEO**[**How One Simple Rephrase Can Reduce Client Anxiety During Retirement Conversations**](https://www.linkedin.com/feed/update/urn%3Ali%3Aactivity%3A7358512380638633984/)New clients may find discovery meetings stressful, especially when planning for their futures. Joe Buhrmann from our Advisory Financial Planning... [**Watch Now >**](https://www.linkedin.com/feed/update/urn%3Ali%3Aactivity%3A7358512380638633984/) |

 |

 |

 |

|  |  |  |  |
| --- | --- | --- | --- |
|

|  |  |  |
| --- | --- | --- |
|

|  |  |
| --- | --- |
|

|  |
| --- |
| **BLOG**[**Have You Considered These 5 Ways to Build Trust During Client Onboarding?**](https://emoneyadvisor.com/blog/5-ways-financial-planners-can-build-trust-during-client-onboarding/)Onboarding is more than just an opportunity to gather financial data, but it's a time to build trust by fostering the beginnings of a positive relationship... [**Read More >**](https://emoneyadvisor.com/blog/5-ways-financial-planners-can-build-trust-during-client-onboarding/) |

 |

 |

 |

|  |  |  |  |
| --- | --- | --- | --- |
|

|  |  |  |
| --- | --- | --- |
|

|  |  |
| --- | --- |
|

|  |
| --- |
| **SERVICE HIGHLIGHT**[**Need Extra Support?**](https://emoneyadvisor.com/services-and-support/data-entry/)[**We Have a Team for That.**](https://emoneyadvisor.com/services-and-support/data-entry/)Data entry doesn’t have to slow you down. Discover how our expert Data Migration Services team can help save you time, reduce errors, and keep... [**Learn More >**](https://emoneyadvisor.com/services-and-support/data-entry/) |

 |

 |

 |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|

|  |  |  |  |
| --- | --- | --- | --- |
|

|  |
| --- |
| [**See What's New and Coming to eMoney from the One Big Beautiful Bill Act (2025 Budget Reconciliation Bill)**](https://blog.emoneyadvisor.com/product-updates/one-big-beautiful-bill-act-2025-budget-reconciliation-bill/)The One Big Beautiful Bill Act (2025 Budget Reconciliation Bill) introduces changes that could impact client strategies. We’re prioritizing timely updates in eMoney to support your planning efforts. You can also listen to [**this short podcast episode**](https://emoneyadvisor.com/knowledge-base-podcast/podcast/breaking-down-the-obbb-in-emoney/) about how eMoney is responding to the new tax legislation with Senior Financial Planning Consultan, Michelle Riiska. |
| Celebrate 25 with eMoney - Watch our story to see how a commitment to continuous innovation has shaped our history, and how we continue to set the course for the next era of financial planning.. Learn More |
|  |

 |

 |

 |

|  |  |  |
| --- | --- | --- |
|

|  |  |
| --- | --- |
|

|  |
| --- |
|  |

 |

 |

 |

