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

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

|  |
| --- |
| If you are having trouble reading this email, [read the online version](https://app.go.emoneyadvisor.com/e/es?s=225884627&e=275099&elqTrackId=64bbcdbe8888401c830844e2f7189fd5&elq=7ed50208c9b546e790d48a27c23bf5a1&elqaid=5895&elqat=1&elqak=8AF5DA70088DBD87D922E084878D128BFC96724ADDAE081CE0BC856263F9D036C8FB). |

 |

 |

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

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

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

|  |
| --- |
| A blue and black logo  AI-generated content may be incorrect. |
| 92% of advisors said clients are more satisfied because of eMoney. |

 |

 |

 |

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

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

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

|  |
| --- |
| Hi Sabrina,**Helping clients build wealth is always top of mind—but are you tapping into every opportunity?** Strategic tax planning can unlock significant value. Learn how to use Roth conversion strategies to maximize returns, fill tax brackets efficiently, and boost your clients’ net worth, while following along with this sample client demonstration.[**Maximize Tax Efficiency with Roth Enhancements**](https://blog.emoneyadvisor.com/best-practices/maximize-tax-efficiency-with-roth-enhancements/) |
|  |
|  |

 |

 |

 |

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

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

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

|  |
| --- |
| **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. [**Learn more.**](https://blog.emoneyadvisor.com/product-updates/one-big-beautiful-bill-act-2025-budget-reconciliation-bill/) |
| **More Roth Strategy Resources:** |
| **USER GUIDE**[**A Roth Conversion Type: Fill Up Tax Bracket**](https://content.emaplan.com/knowledgebase/interactive/Retirement%20Accounts/) The Fill Up Tax Bracket conversion type includes some unique nuances worth noting. This guide breaks down how eMoney determines the amount to convert based on the selected tax bracket—helping you model with more clarity and confidence. |
| **PODCAST**[**Roth Conversions: The Domino Effect of Optimizing Taxes**](https://emoneyadvisor.com/knowledge-base-podcast/podcast/roth-conversions-the-domino-effect-of-optimizing-taxes/) Hear from John Costello in part one of our Roth conversions discussion from earlier this year! Explore different conversion types and how to model them in eMoney to support strategic tax planning for your clients. |
| **PODCAST**[**Roth Conversions Part Two: Best Practices for Modeling in eMoney**](https://emoneyadvisor.com/knowledge-base-podcast/podcast/roth-conversions-part-two-best-practices-for-modeling-in-emoney/?elqTrackId=DD42994FD577AF7061565C816DA25AFD&elqTrack=true) In part two of our Roth conversions conversation, eMoney Senior Business Analyst John Costello shares which reports best illustrate Roth conversions and offers tips and tricks for seamless in-app modeling. |
| Celebrate 25 with eMoney - Matt Schulte reflects on the past 25 years at eMoney—and how those milestones are shaping the future of advice. Learn More |

 |

 |

 |