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| |  |  |  | | --- | --- | --- | | |  |  | | --- | --- | | |  | | --- | | If you are having trouble reading this email, [read the online version.](https://app.go.emoneyadvisor.com/e/es?s=225884627&e=275647&elqTrackId=64bbcdbe8888401c830844e2f7189fd5&elq=a1da5c422edb4af694454d37d24cfe70&elqaid=6037&elqat=1&elqak=8AF50D25F0C1E5C40CA5EF7C6EA4CACF4538A43B04D2A76D12332B03F1C9F3839A11) | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  | | --- | --- | --- | --- | --- | | |  |  |  |  | | --- | --- | --- | --- | | |  | | --- | | eMoney | | Best Practices Newsletter | | Hi Sabrina,  What if the key to growing your planning revenue isn’t just in your strategies, but in the experience you deliver?  Here, we share **5 resources and a coming update** to help you achieve an exceptional client experience. Those who do, build lasting relationships that drive meaningful conversations. |   **Resources** | | |  |  |  |  |  | | --- | --- | --- | --- | | |  |  |  | | --- | --- | --- | | |  |  | | --- | --- | | |  | | --- | | **INTERACTIVE GUIDE**  **[Are You Fully Utilizing Tasks and Alerts?](https://content.emaplan.com/knowledgebase/interactive/Alerts%20and%20Tasks/" \o "https://urldefense.com/v3/__https://content.emaplan.com/knowledgebase/interactive/Alerts*20and*20Tasks/?utm_campaign=CC_L1_Best_Practices_September_2025&utm_medium=email&utm_source=Eloqua&elqTrackId=45A367DAE00FF658A9F91F1B9D475EC6&elq=a1da5c422edb4af694454d37d24cfe70&elqaid=6037&elqat=1&elqCampaignId=&elqak=8AF5C7E022AB30F30D22460B5B9907600407A43B04D2A76D12332B03F1C9F3839A11**A__;JSUjLw!!GUnOtmw!uziNOnTvyYlOuqvaY0AX9w82NTHmbnCK5psy3-anSv6d69qVq4z_AEIppce7yBrFB687A-IEEYJAwujgRD2IvUFjisJwcM7jDBJJ$)**  Tasks and Alerts can help you to keep track of situations and opportunities relating to your clients in eMoney. This interactive guide helps...[**read more.**](https://content.emaplan.com/knowledgebase/interactive/Alerts%20and%20Tasks/) | | | |  |  |  |  |  | | --- | --- | --- | --- | | |  |  |  | | --- | --- | --- | | |  |  | | --- | --- | | |  | | --- | | **PRODUCT HIGHLIGHT**  [**How to Highlight Material You Want Your Clients to Engage with Most**](https://content.emaplan.com/Knowledgebase/interactive/Managing%20the%20Client%20Website/)  Have you turned on the ***My Advisor***page for your clients? Launched in March 2024, this page allows you to showcase your brand and highlight...[**turn it on!**](https://content.emaplan.com/Knowledgebase/interactive/Managing%20the%20Client%20Website/) | | | |  |  |  |  |  | | --- | --- | --- | --- | | |  |  |  | | --- | --- | --- | | |  |  | | --- | --- | | |  | | --- | | **PODCAST SUMMARY**  [**Getting Clients Out of Their Heads and Into Their Hearts with Brendan Frazier**](https://emoneyadvisor.com/blog/heart-of-advice-podcast-with-brendan-frazier/)  Uncovering the intersection of personal connection, emotional intelligence, and professional success, may be where the planner's role is evolving... [**read more >**](https://emoneyadvisor.com/blog/heart-of-advice-podcast-with-brendan-frazier/) | | | |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  | | --- | | **SUMMIT SESSION SPOTLIGHT**  [**The Art of Asking Questions (1 CFP® CE Credit)**](https://emoneyadvisor.com/summit/sessions/)  In a world filled with more options for financial advice, one truth is becoming crystal clear: clients don’t just stay with a financial professional just because of... [**read more >**](https://emoneyadvisor.com/blog/financial-planners-elevate-client-experiences/?utm_campaign=CC_L1_Best_Practices_September_2025&utm_medium=email&utm_source=Eloqua&elqTrackId=DCEDB4886C12BB63BA5B6FE8E198BCE1&elq=a1da5c422edb4af694454d37d24cfe70&elqaid=6037&elqat=1&elqCampaignId=&elqak=8AF5FD202E17BC0EEF2682A3014C69A161D5A43B04D2A76D12332B03F1C9F3839A11) |  |  |  |  | | --- | --- | --- | | |  |  | | --- | --- | | |  | | --- | |  | | |  |  |  |  |  | | --- | --- | --- | --- | | |  |  |  | | --- | --- | --- | | |  |  | | --- | --- | | |  | | --- | | **SUMMIT SESSION SPOTLIGHT**  **[The Art of Asking Questions (1 CFP® CE Credit)](https://emoneyadvisor.com/summit/sessions/" \t "_blank)**  Strong client relationships are built on trust—and trust starts with asking the right questions. Join us for this session at the virtual eMoney Summit. [**Learn more >**](https://emoneyadvisor.com/summit/sessions/) | | | | | |  |  |  |  |  | | --- | --- | --- | --- | | |  |  |  | | --- | --- | --- | | |  |  | | --- | --- | | |  | | --- | |  | | | |  |  |  |  |  |  | | --- | --- | --- | --- | --- | | |  |  |  |  | | --- | --- | --- | --- | | |  |  |  | | --- | --- | --- | | |  | | --- | | **Updates** | | **PRODUCT HIGHLIGHT**  **A New Client Onboarding Flow is Coming Next Week!**  Beginning September 23, introduce a redesigned Getting Started experience to your new clients—an intuitive, modern onboarding flow that empowers them to build a basic financial plan at their own pace. Stay tuned! | | | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | |  |  |  |  |  | | --- | --- | --- | --- | --- | | |  |  |  |  | | --- | --- | --- | --- | | |  | | --- | | **NEW UPDATES ADDED SEPTEMBER 16**  [**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. | | eMoney Yearbook Series - Celebrate eMoney’s 25th Anniversary by getting to know some of our talented team members!  Kathy Hieng -  Senior Enterprise Product Solutions Owner - Meet Kathy! | |  | | | |  |  |  |  | | --- | --- | --- | | |  |  | | --- | --- | | |  | | --- | |  | | | |

