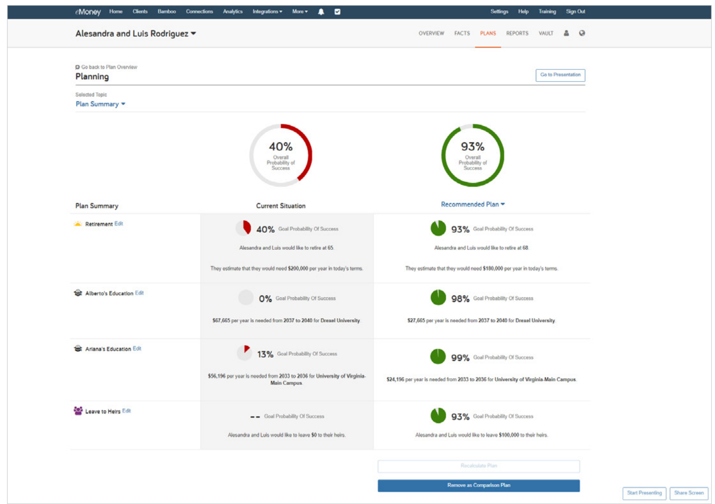
eMoney

FOUNDATIONAL PLANNING

Deliver More Plans to More Clients

Key Features:

- Consolidated end-to-end planning experience, from data gathering through plan presentation
- Planning that's focused on retirement, education, and spending goals
- Interactive side-by-side scenario planning, including Monte Carlo
- Life Insurance Gap Analysis to demonstrate if your clients' current life insurance coverage adequately protect their families



With Foundational Planning, you can:

Scale Your Planning

Extend planning across your client base and serve a variety of needs through a single platform.

Improve the Client Experience

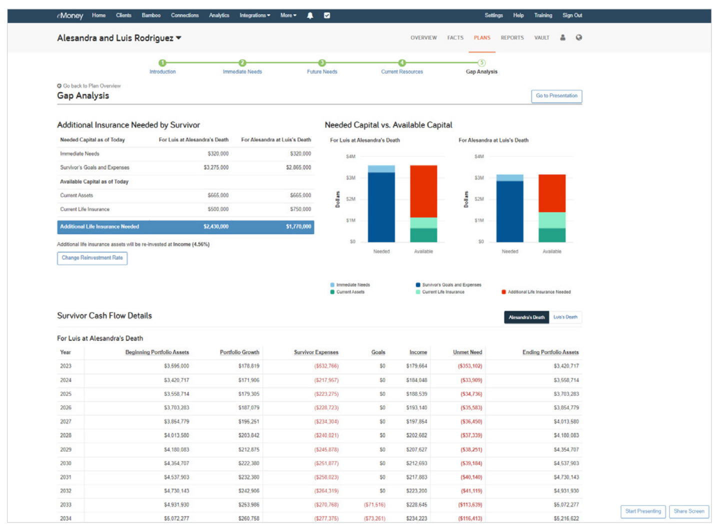
Collaborate with clients on their life and wealth goals through an interactive and engaging experience.

Create a Financial Plan Quickly and Efficiently

Leverage a straightforward, guided workflow to efficiently produce more plans for more clients.

Adapt Plans as Client Needs Evolve

As client finances mature, continue to meet their planning needs by seamlessly graduating them to our more advanced solutions.



Want to learn more? Visit us at emoneyadvisor.com or call 888-362-4612 to schedule your free trial.