**Subject Line**: Looking for support scaling advice across your firm?

**Preheader**: Standardize planning process across your firm and save hours...

Consistent, Personalized Planning—Made Simple with Presentation View

What if your firm could standardize planning conversations—and still personalize at scale—using a shared, repeatable framework? *Presentation View* in *Decision Center* (currently available in your experience) helps you deliver consistent client experiences, save hours of prep, and still tailor to each client’s goals.

[**Scale Digital Advice Faster Today →**](https://blog.emoneyadvisor.com/best-practices/scale-digital-advice-faster-save-hours-with-reusable-templates-in-presentation-view/)

**The Power of Reusable Templates**

With *Templates* in *Presentation View*, **you can**:

* **Save hours** by reusing proven structures
* **Standardize planning** conversations firm‑wide
* **Personalize quickly** for each client’s goals

**► See Templates in Action**

**VIDEO**

**Want to create polished presentations in minutes—not hours?** See how *Presentation View* and *Templates* make it easy to build, collaborate, and share client‑ready presentations. This 3‑minute overview shows how quickly everything comes together. 👉 [Watch now →](https://blog.emoneyadvisor.com/best-practices/scale-digital-advice-faster-save-hours-with-reusable-templates-in-presentation-view/?elqTrackId=BE2486863F9992323F416233631A7D2F&elqTrack=true#video)

**ONLINE TRAINING**

**Got 10 minutes to master creating and sharing templates with clients?** This interactive online training walks you through creating, customizing, and publishing templates to the *Client Portal*—so you’re up and running fast. [**Start the training →**](https://content.emaplan.com/Knowledgebase/interactive/Decision%20Center/?elqTrackId=65BBE2467DC1CB829B96C1FB95498E5C&elqTrack=true)

**Rather Join a Live Training Session?**

Join a live in-depth walkthrough of how to use *Presentation View* effectively during client conversations.

**You'll learn how to:**

* Use prebuilt templates
* Build a custom presentation
* Create a template
* Present interactively

**Session dates:**

* **Thursday, January 22 | 12:00 - 1:00 p.m. ET**
* **Monday, February 2 | 12:00 - 1:00 p.m. ET**

Sign into *The Learning Center or SSO into your experience.* Once logged into *The Learning Center*, click *Training* and search for "*Presentations Live Session.*"