**Subject Line**: What’s New in January: Compare Plans with Confidence

**Preheader**: Plus, big updates coming soon!

How do youhelp clients ***compare plans with confidence***—and ***move forward faster*?**

*Plan Comparison* builds on the existing *Goal Planner* experience to enable deeper, more meaningful plan comparisons in a faster, more intuitive way.

**See richer information in a single, streamlined view, edit key data, and evaluate multiple options side by side.** Clearly surface trade‑offs and outcomes, collaborate with clients in real time, and align on the right path forward—without slowing the planning conversation.

[**See Plan Comparison in Action**](https://blog.emoneyadvisor.com/emoney-updates-q1-2026/#Plan-Comparison)

## More January Highlights

*Releases January 28*

[**Asset Allocation Report in Decision Center**](https://blog.emoneyadvisor.com/emoney-updates-q1-2026/?elqTrackId=4555ED9FEB909DCB5396EC0705565938&elqTrack=true#Asset-Allocation-Report)

To ensure a comprehensive, interactive planning experience as part of our ongoing goal of creating a more centralized planning hub in *Decision Center*, we've expanded the report library to include *Asset Allocation*.

*Releases January 28*

[**Integration Update: Asset-Map Support Page and SSO**](https://blog.emoneyadvisor.com/emoney-updates-q1-2026/?elqTrackId=4DB0C54B971F3959CDDAED6A8B31CCB3#Asset-Map)

In our ongoing effort to expand our integrations and make it as simple as possible to learn more about them, the *Asset-Map* integration now has a new support page along with a button to "*Turn On*" the integration directly.

## Highly-Anticipated Updates Coming Soon

*Coming Early March*

[**New Adaptive Multi-factor Authentication**](https://blog.emoneyadvisor.com/emoney-updates-q1-2026/?elqTrackId=53B759EE151C539CB8EFEA3B369B3BC7&elqTrack=true#OKTA)

As part of our commitment to delivering best-in-class digital experiences, eMoney is modernizing our platform and strengthening our security program in collaboration with Okta, a trusted partner and industry leader in identity management.

*Coming March 25*

[**CoPlanner: A Smarter Way to Plan**](https://blog.emoneyadvisor.com/emoney-updates-q1-2026/?elqTrackId=D391A5CA7C621D8F0C5AED2DDB808A62#CoPlanner)

Build plans faster, maintain control and spend less time modeling with *eMoney CoPlanner.*

*Coming March 25*

[**Foundational Planning, Reimagined**](https://blog.emoneyadvisor.com/emoney-updates-q1-2026/?elqTrackId=D98AA9743566819E79AA5498CDA7DBFA&elqTrack=true#FoundationalPlanning)

Holistic goals-based financial planning will soon get much easier. Work in one streamlined experience to save time, improve consistency, and help deliver plans more efficiently with our newly reimagined *Foundational Planning*, launching March 25 for Plus and Premier users.

*Coming March 25*

[**Gather Client Data without Enabling the Portal**](https://blog.emoneyadvisor.com/emoney-updates-q1-2026/?elqTrackId=925682F482F14FE4E3FB64BA23773A4C#SDG)

Run onboarding your way by collecting client data first and introducing the Client Portal later, when (or if!) it fits your workflow and client relationship with *Standalone Data Gathering*.

*Coming March 25*

[**Manage Client Portal Settings at Scale**](https://blog.emoneyadvisor.com/emoney-updates-q1-2026/?elqTrackId=43CEC60E300CF1DB826C0536A747F440#Client-Portal-Settings)

Deliver a consistent, high-quality experience for all clients at once with upcoming Client Portal enhancements. Easily manage Client Portal settings from one centralized location, ensuring faster and easier configuration.

[**See All Product Updates**](https://blog.emoneyadvisor.com/emoney-updates-q1-2026/)

## Other Important Updates

* **2026 Tax Update:** To support accurate planning calculations, federal tax-related values and contribution limits have been updated to their 2026 values.
* ***Insights* in the *Decision Center* now has a new name: *Solvers*.** This update reflects its growing role in helping you not just understand data, but actively solve complex decisions with confidence.
* Spend less time on data entry and more time with clients. With **Document Intelligence, the latest feature in the *Zocks* integration**, you can upload client documents and let AI instantly read, summarize, and structure the data into the appropriate fields.

## LIVE WEBINAR

**Looking Back to Look Forward**

Join leaders from eMoney’s Financial Planning and Product teams for [***Looking Back to Look Forward: A 2025 Recap (1 CFP® CE Credit)***](https://emoneyadvisor.com/resources/webinars/looking-back-to-look-forward-a-2025-recap/?elqTrackId=BC5C1456B1862F9B85CE1706E4D61D38&elqTrack=true)on **Thursday, February 12**, from **2:00 – 3:00 p.m. ET** to:

* Get a clearer view of **how advisor‑led planning evolved in 2025**
* **Apply research‑backed takeaways** to future client conversations
* **Preview upcoming product advancements** shaping collaborative planning in 2026

[**Register & Earn 1CFP® CE**](https://emoneyadvisor.com/resources/webinars/looking-back-to-look-forward-a-2025-recap/)

*Plan confidently for 2026*