**Subject Line**: Advisors, What If You Could Create Plans Faster?

**Preheader**: A faster way to build actionable planning strategies is coming soon.

**What if you could create faster plans for more possibilities?**

**Launching March 25, *CoPlanner***helps advisors spend less time building plans and more time building trust by instantly analyzing client data and presenting personalized, actionable strategies.

[**Preview the CoPlanner Experience**](https://blog.emoneyadvisor.com/emoney-updates-q1-2026/#CoPlanner)

**Highly-Anticipated Updates Coming Soon**

*Coming March 25*

**Deliver Plans More Efficiently with the New Foundational Planning**

Holistic goals-based financial planning is getting much easier. Work in one streamlined experience that saves time, improves consistency, and helps deliver plans more efficiently with our newly **reimagined *Foundational Planning***.

*Coming March 25*

**Enhanced Branding and Settings to Make the Portal *Yours***

*Premium Client Portal* users will have the ability to extend their firm's branding across desktop and mobile with **enhanced branding controls** and **mobile icon customization**.

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

**Other Important Updates**

*Coming March 5*

**New Adaptive Multi-factor Authentication**

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 February 25*

**Keep Accounts Up to Date Automatically: New *Flourish* Integration Enhancements**

When new accounts open, manually adding and linking them in eMoney can slow down your workflow and lead to gaps in planning data. Enhancements to the *Flourish* integration **automatically add and link *Flourish* accounts to eMoney *Facts***, reducing manual work and keeping client information up to date with minimal effort.

*Retiring February 28*

**Morningstar Integration Sunset**

**The *Morningstar Office* integration will be retired on February 28 and will be removed from the *Integrations* page.** This is due to Morningstar’s decision to discontinue the *Morningstar Office* platform. Moving forward, users with the *Morningstar Advisor Workstation* integration enabled can continue accessing similar functionality through that integration.

**LIVE WEBINAR**

**Bringing Planning to More People in 2026**

Learn how the new planning continuum can start with simple, topical conversations that naturally build toward deeper, more holistic strategies as investors’ needs grow. Join us for [**the first session in our new quarterly Smarter Planning webinar series**](https://emoneyadvisor.com/resources/webinars/bringing-planning-to-more-people-in-2026) on **Thursday, February 26, 2026, from 2:00 - 3:00 p.m. ET.**

[**Reserve My Seat**](https://emoneyadvisor.com/resources/webinars/bringing-planning-to-more-people-in-2026/)

**LIVE WEBINAR**

**February Product Updates**

Join eMoney’s Training Team on **Tuesday, March 3, from 2:00 - 3:00 p.m. ET** to learn more about eMoney’s most recent release that include improvements and updates with several third-party Integrations along with enhancements to our *Premium Client Portal*.

Sign into the *Learning Center* and search "**Upcoming Product Webinar 3.3.26**" to save your spot!