

Planning Prevails for eMoney Users During COVID-19

The first half of 2020 saw heightened market volatility amid the global response to the novel coronavirus (COVID-19). Our survey found that eMoney users, however, have continued to strengthen their planning relationships and even find new opportunities in this environment.

eMoney helped increase client satisfaction and decrease anxiety.

Advisor Satisfaction

85%

believe clients with financial plans were more satisfied with their advisor during this environment

Less Anxiety and Discomfort

81%

believe clients with a financial plan had less discomfort and anxiety

Advisors have seen positive engagement in client relationships.

93%

of advisors feel the current environment has had a **positive impact** on **client relationships**



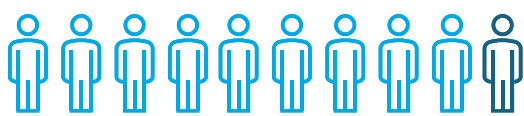
Nearly 4 out of 5 advisors believe the current environment has **positively impacted** their ability to **connect with clients**

37%

of advisors witnessed inquiries from **new clients** about creating a **financial plan**

eMoney supported advisors to connect, reassure, and plan with clients.

“I am bringing planning to more clients than ever before since eMoney is a great way to connect and calm fears.” –Advisor



Nearly 9 in 10 advisors believe they have received good support from eMoney since the COVID-19 crisis began



76% could reassure clients they are still on track with their financial plan



60% could refocus the conversation on the goal realization and planning rather than market volatility



69% have seen an increase in virtual client presentations



60% believe eMoney provides opportunities to connect with clients digitally/remotely