

Solutions to Grow and Scale Your Business

You shouldn't have to worry that your clients are going to outgrow your software. With scalable solutions that meet a broad range of planning needs, you'll always have the right tool for any situation. Choose a package that aligns to the type of planning you offer today and will keep your clients happy and engaged tomorrow.

Which option is right for you?

PLUS

An intuitive, streamlined solution for advisors looking to build planning-led relationships and deliver more plans to more clients.

INCLUDES:

Platform
Advanced Analytics
Foundational Planning

PRO

The most comprehensive set of advanced planning capabilities available to accommodate complex financial needs.

INCLUDES:

Platform
Advanced Analytics
Advanced Planning

PREMIER

A fully integrated solution that enables planning for all clients regardless of their financial situation.

INCLUDES:

Platform
Advanced Analytics
Foundational Planning
Advanced Planning



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

Learn what's included in Foundational Planning and Advanced Planning through the product comparison below.



Features	FOUNDATIONAL PLANNING Available in Plus and Premier	ADVANCED PLANNING Available in Pro and Premier
Cash Flow Planning		✓
Goal-centric Planning	✓	
Education Planning	✓	✓
Retirement Planning	✓	✓
Investment Planning	✓	✓
Stock Options		✓
Tax Planning		✓
Estate Planning		✓
Insurance Planning	✓	✓
Custom Capital Market Assumptions	✓	✓
Monte Carlo Based Results	✓	✓
Stress Tests		✓
Reports	✓	✓
Custom Presentation Templates		✓
Advisor Branded Marketing	Add-On	Add-On
Advisor Assurance	Add-On	Add-On

eMoney's Platform includes:

Account Aggregation	✓	✓
Client Portal	✓	✓
Client Onboarding	✓	✓
Third-party Integrations	✓	✓
Screen Sharing	✓	✓
Digital Lead Capture	✓	✓
Unlimited Digital Document Storage	✓	✓
Award Winning Customer Service	✓	✓
Alerts, Alarms and Tasks	✓	✓

