

# 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](http://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.



## FOUNDATIONAL PLANNING Available in Plus and Premier

## ADVANCED PLANNING Available in Pro and Premier

### Features

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	✓	✓

