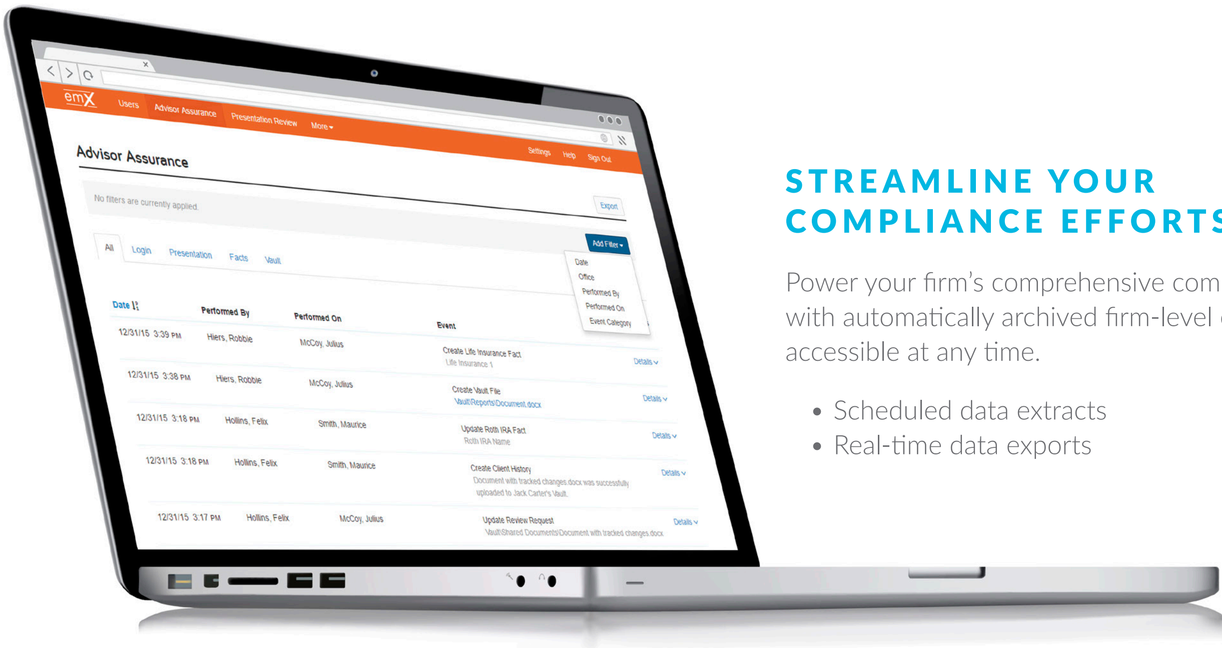
eMoney Advisor

ADVISOR ASSURANCE

Technology for the Entire Office

Advisor Assurance completes your firm's technology offering with tools built specifically for compliance and administrative users working in a highly regulated environment. Now, you can document and archive key advisor-client interactions throughout the planning process to easily monitor an entire office from a single, secure dashboard.



STREAMLINE YOUR COMPLIANCE EFFORTS

Power your firm's comprehensive compliance efforts with automatically archived firm-level event logs accessible at any time.

- Scheduled data extracts
- Real-time data exports

DATA DOWN TO THE SMALLEST DETAILS

Whether your firm has 2 advisors or 2,000, **Advisor Assurance** allows compliance users to easily monitor the activity of advisors and theirs clients. Logged events include:

- Manual account changes
- Client and advisor website activity
- Vault uploads
- Delivered presentations and reports
- Deleted records

4 Radnor Corporate Center, Suite 300 | 100 Matsonford Road | Radnor, PA 19087 | 888-362-4612

www.emoneyadvisor.com | Join the conversation! We're on Facebook | Twitter | LinkedIn