eMoney

Helping People Talk About Money

PLAN

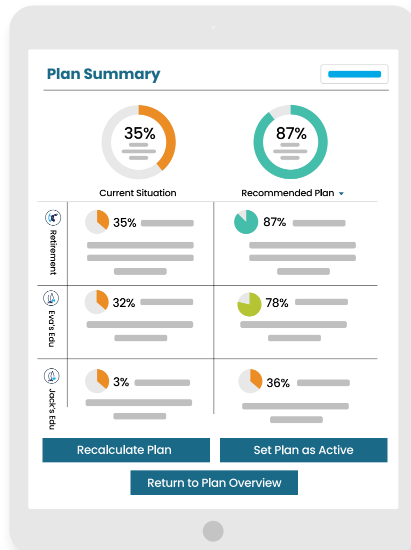
Plan Across the Client Lifecycle

Meet the diverse and growing planning needs of your clients and prospects - **all from a single platform**.

Foundational Planning

Deliver More Plans to More Clients

Establish planning-led relationships with more clients through a streamlined, interactive, and engaging experience focused on their goals.



Key Features

- Streamlined, modular workflow
- Consolidated end-to-end planning experience
- Focused on retirement, education, spending, and life insurance goals
- Interactive side-by-side scenario planning

Key Benefits

Scale Your Planning

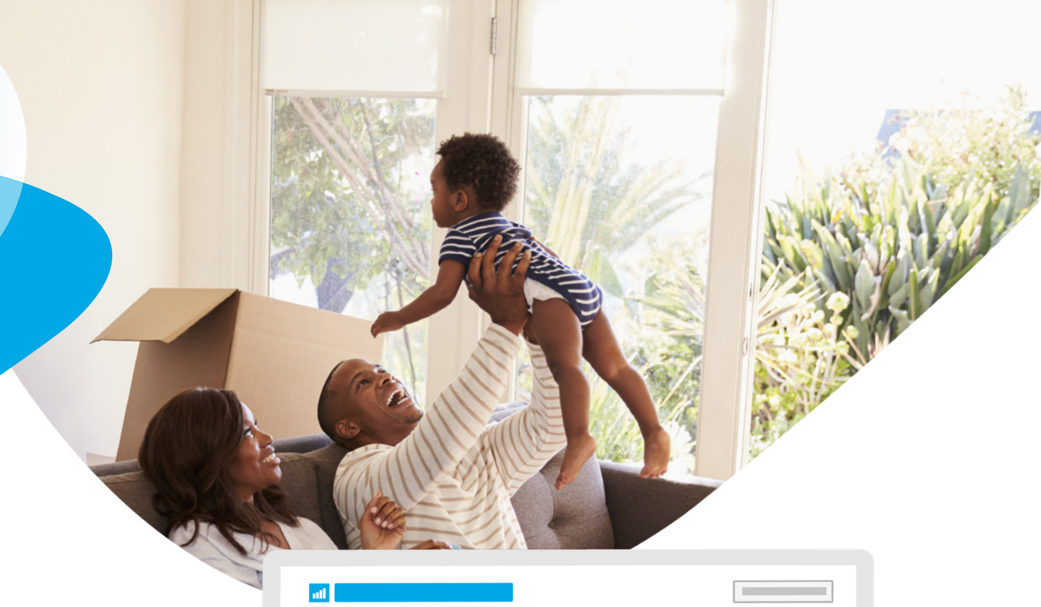
Extend planning across your client base through a single platform that enables you to serve a variety of planning needs.

Produce More Plans for More Clients

Leverage a straightforward, guided workflow—from data gathering to plan output—to efficiently produce more plans for more clients.

Improve the Client Experience

Deepen client engagement by delivering an interactive experience that facilitates planning and drives better client interactions.



Advanced Planning

Most Comprehensive Set of Planning Capabilities

Engage your clients in the planning process and build trust by demonstrating tangible outcomes for complex, real-world scenarios.

Key Features

- Collaborative cash flow planning
- Interactive retirement income planning
- Robust what-if scenario planning
- Comprehensive tax calculations

Key Benefits

Model the Future

Provide clients with an in-depth and personalized look at their financial picture with custom financial blueprints created using dozens of advanced-planning techniques and what-if scenarios.

Simulate Multiple Scenarios

Work side by side with your clients to understand the financial impact their decisions have on their plans. Adjust scenarios and techniques in real time for immediate client reactions and feedback.

Collaborate on Estate Planning

Show clients the risks, vulnerabilities, and benefits of various estate-planning scenarios, and work together to create strategies to better protect their legacy.

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ENGAGE

Engage Your Clients Meaningfully

Bring your client conversations to life with interactive and collaborative experiences that promote engagement and utilization, and foster deeper understanding and stronger relationships.

Advisor/Client Experience

- Client Portal
- Account Aggregation
- Collaboration
- Spending and Budgeting
- Mobile Access
- Alerts and Tasks
- Screen Sharing
- Customizable views of all your relationships

MANAGE

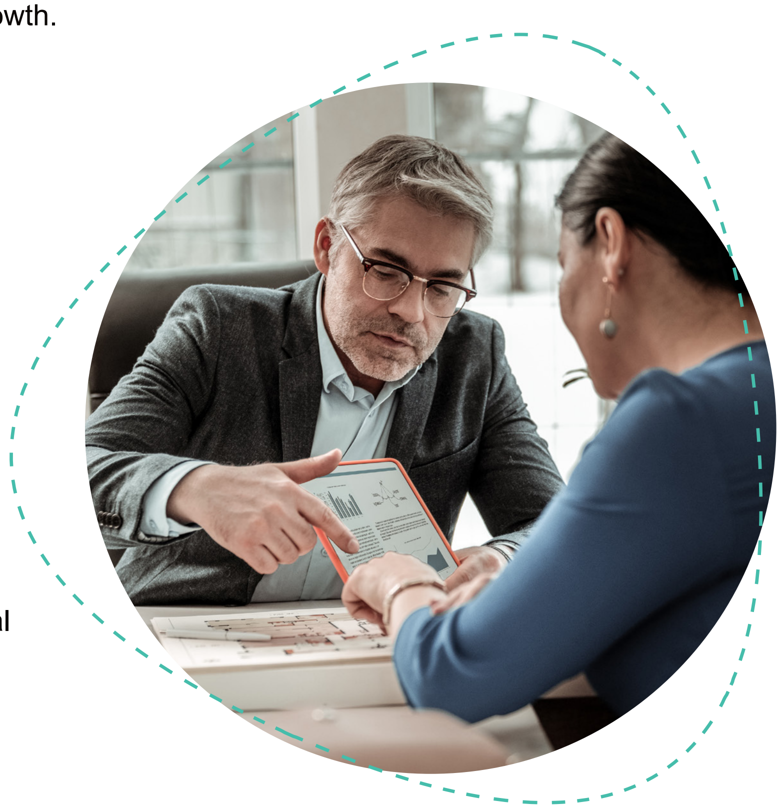
Manage Your Practice Efficiently and Effectively

Easily analyze and identify opportunities for growth.

Advanced Analytics

Make Data-driven Decisions

Gain visibility into your book of business and clients' held away assets to identify new opportunities.



Advisor Assurance

Manage Compliance and Risk

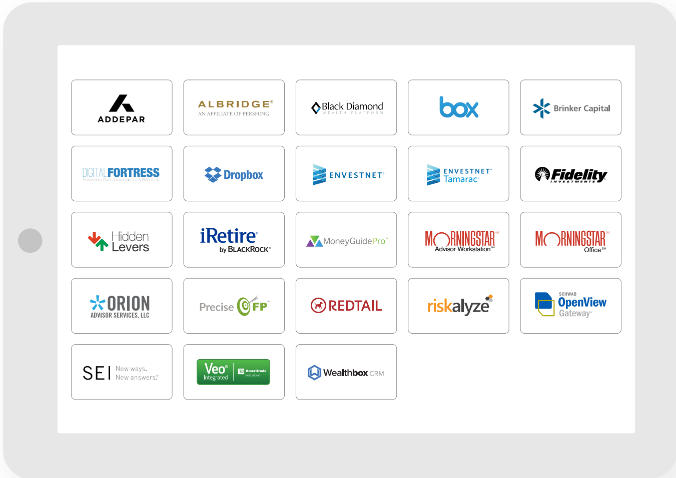
Streamline your compliance efforts through the documentation and archival of key advisor-client interactions throughout the entire financial planning process.

STREAMLINE

Streamline Your Tech Stack

Built for the way you work, our integrations provide access to the technology you need, when and where you need it.

From CRMs to risk analysis and everything in between, we work with providers equally committed to ensuring a superior client experience and the highest levels of data security.



GROW

Grow Your Business

Attract, convert, and retain clients with digital marketing tools and relevant content, all from within the eMoney platform.

Lead Capture

An interactive and self-guided prospecting tool that lets you easily identify investors who are ready to engage with an advisor.

Advisor Branded Marketing

All the resources you need to effectively target, nurture, convert, and engage clients digitally.

Landing Page | Social Posts | Gated Content | Launch Emails | Video | Nurture Emails

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Comprehensive
Planning-led Platform

eMoney is more than just world-class financial planning software. Whether it's helping you convert prospects into clients, collaborate on financial plans, or manage the business, the eMoney platform is built for scale.
All so you can spend more time doing what you do best:

helping clients plan for the future.

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.

PLUS

Leverage Foundational Planning's intuitive, goals-based solution to build more planning-led relationships and deliver more plans to more clients.

INCLUDES:

Platform
Foundational Planning
Advanced Analytics

PRO

Harness Advanced Planning to provide the most comprehensive cash flow-based capabilities to accommodate clients' most complex planning needs.

INCLUDES:

Platform
Advanced Planning
Advanced Analytics

PREMIER

Combine Foundational Planning and Advanced Planning for a truly integrated solution that enables planning for all clients regardless of financial situation, on a single platform.

INCLUDES:

Platform
Foundational Planning
Advanced Planning
Advanced Analytics