

Work Smarter, Not Harder

Powerful Integration Options from eMoney Advisor. At eMoney Advisor, we work with a number of the industry's most prominent software providers to deliver powerful integration options for our financial advisors. The result is an industry-leading, comprehensive wealth management system that gives you the ability to simplify your day-to-day operations while maximizing your value.



- Client and Account Importing
- Vault Storage
- Easily move between platforms



- Single sign-on
- Report generation
- Client and account importing



- Single sign-on
- Portfolio linking
- Report generation
- Vault storage



- Access Box in eMoney
- Document transfers



- Single sign-on



- Single sign-on



- Access Dropbox in eMoney
- Document transfers



- Account data feed
- Single sign-on
- Client and account importing
- Vault storage of QPRs
- Proposal generation



- Single sign-on
- Client site single sign-on



- Account data feed
- Single sign-on
- Client site single sign-on
- Client and account importing
- Account opening
- Performance data
- Vault storage & Client Site eDelivery



- Single sign-on
- Report generation



- Single sign-on



- Advisor and client single sign-on
- Plan generation and Vault storage
- Bi-directional assets under management and held away sync
- Client information sync
- MoneyGuidePro Confidence Zone snapshot



- Single sign-on (Workstation only)
- Report generation

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- Single sign-on (Workstation only)
- Report generation



- Generate a Zillow Zestimate®



- Import client personal details, assets, liabilities, and insurance policies



- Account data feed
- Single sign-on
- Client importing
- Report generation
- Performance data
- Vault storage



- Single sign-on
- Client Risk Number visibility
- Portfolio Risk Number visibility
- Riskalyze Risk Tolerance questionnaire
- Account information exporting



- Single sign-on
- Client importing
- Account data feed
- Bi-directional client information sync
- Bi-directional notes sync
- Bi-directional tasks sync



- Single sign-on
- Client importing
- Report generation



- One time password
- Single sign-on



- Single sign-on
- Client importing
- Bi-directional client information sync



- Single sign-on Vault Storage