

PRODUCT

# eMoney Platform Configuration Summary

The eMoney Platform Configuration Summary provides a high-level overview of configurations available for your enterprise. Our typical implementation takes 14 to 16 weeks. All items outlined below are available for configuration during the initial setup. After the initial setup, changes can be made, with 30-days notice, during a regularly scheduled software upgrade.

## Configurations are available in the following areas:



**Branding**



**Legal Disclosures**



**Investment Data  
& Assumptions**



**Reports**



**Single Sign-On**



**Security**



**Advisor Website**



**Partner Integrations**



**Data Feeds**



## Branding

To help you promote your firm's brand consistently across the eMoney platform, you can display your logo on the Login Page, Client Website, and Presentation Cover Page.



## Legal Disclosures

eMoney allows firms to include their legal disclaimers within client presentations, in the website footers, within the client and advisor applications, on the login page, and at the bottom of system-generated emails. Administrators can now customize company legal disclosures for their specific offices.



## Investment Data & Assumption

eMoney clients can select from two options to input Capital Market Assumptions (CMAs)—by providing investment data of their choosing or by selecting the eMoney default of historical indices, asset classes, and model portfolios. Firms can further decide to map asset classes to predefined eMoney categories based on Morningstar classifications for stocks and mutual funds, or override them with the organization's custom Master Security Database file.

Risk Tolerance Questionnaires assess the appropriate level of financial risk a client is willing to accept. Firms have the option to select from eMoney's default set of questions and scoring, adjust the eMoney default scoring and model portfolio mapping, or provide a custom Risk Tolerance Questionnaire with their own questions, answers, and scoring methodology.



## Reports

To reduce the burden of creating reports in-house, eMoney includes numerous reports like Balance Sheet, Asset Allocation, and Cash Flow among others that advisors can share with their clients. You can select specific reports and report templates you want to make available for advisors to use with clients.



## Single Sign-on

Having to repeatedly enter credentials to access different websites adds time and inconvenience to the workday, especially when you forget a password. With single sign-on access, advisors have the convenience of entering one set of credentials to access eMoney directly from their advisor portal.



## Security

To help your firm maintain your clients' trust, you can customize the length of time that login credentials, for both advisor or client, remain active. If no duration is selected, eMoney will automatically notify advisors to change passwords every 60 days and clients to update their passwords yearly.



## Advisor Support

For clients who need help with eMoney, firms have the option to direct their advisors to their home office support team or eMoney. For example, advisors can include contact details of their own support team or eMoney support on their website.



## Partner Integrations

Save time and simplify the user experience by utilizing integrations between eMoney and many of the industry's most widely used technologies. Enjoy the benefits of single sign-on access and bi-directional data sharing. Select from numerous integration partners, including Fidelity, Envestnet, Morningstar, Redtail, Riskalyze, Salesforce, and more. For a more detailed summary of the current integrations, please review the [eMoney Integrations Summary Overview](#).



## Data Feeds

eMoney offers users two ways to automatically populate client data within the platform. 1) Investors can connect their accounts to their eMoney Client Portal. 2) Firms can build a "direct feed" to populate client data with client accounts, holdings, and transactions. To build a direct feed, your firm will provide a flat file or use Web services (APIs) to include firm-specific data. To gather client account information, advisors will need to input credentials assigned to them by your firm within the Connections console.