eMoney

# ADVANCED ANALYTICS

Advisor Analytics Pro
**(For Advisors & Support)**

Office Analytics
**(For Office Managers)**

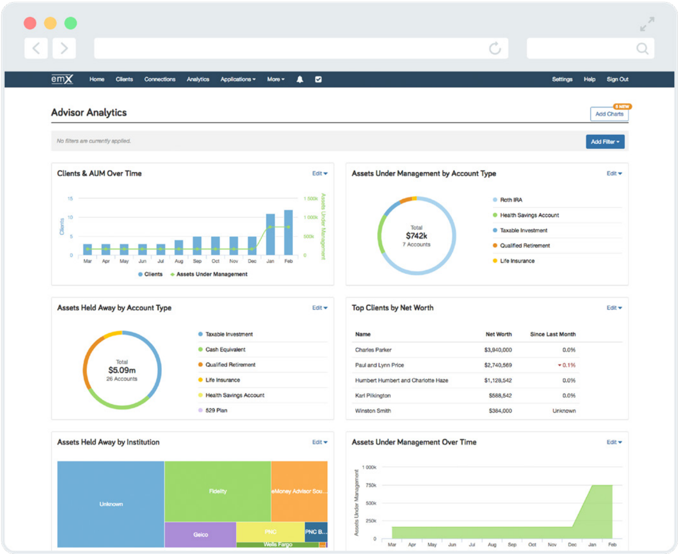
Uncover insights that drive business opportunities, monitor client engagement, and assess performance across advisors and offices, with **Advisor Analytics Pro** and **Office Analytics**.

Review eMoney data, including hundreds of client and advisor metrics, in one location with built-in analytics, reports, and dashboards. Analyze performance and make data-driven decisions at a glance–right from within the eMoney platform.

# ADVISOR ANALYTICS PRO

**(For Advisors & Support Staff)**

Advisor Analytics Pro provides advisors with data-driven insights to spot business opportunities, track client engagement, and take action to drive success. Answer questions, such as: Where are my client's assets held away? Are my most frequent users in their 20s and 30s or in their 50s and 60s? What's the best day and time to release marketing content to my clients?




- Customizable dashboard
- Available to advisors, planners, and support
- Add-on product
- Ability to export chart data
- Charts:

### BUSINESS OPPORTUNITIES

- Assets Held Away by Account Type
- Assets Held Away by Institution
- Asset Status
- Liability Status
- Liabilities Held Away by Account Type
- Liabilities Held Away by Institution
- Top Clients by Assets Held Away
- Top Holdings Held Away
- Top Clients by Net Worth
- Life Insurance Held Away by Policy Type

### BUSINESS TRENDS

- Assets Under Management by Account Type
- Assets Under Management by Institution
- Assets Under Management Over Time
- Clients and Assets Under Management Over Time
- Clients Over Time
- Asset Status
- Liabilities Status
- Top Clients by Assets Under Management
- Top Holdings Under Management
- Life Insurance Under Management
- Liabilities Under Management by Institution
- Life Insurance Policy Anniversary by Month

### CLIENT ENGAGEMENT

- Client Website Last Logon
- Client Websites
- Marketing Views by Link Type
- Top Marketing Pieces
- Client Logins Over Time
- Top Clients by Logins

### CLIENT DEMOGRAPHICS

- Clients by Age Group
- Clients with Active Websites by Age

### COMPLIANCE

- Fiduciary Rule – Retirement Assets Under Management
- Fiduciary Rule – Retirement Assets Held Away
- Fiduciary Coverage

### CLIENT MATERIAL

- Presentations
- Scenarios
- Vault Files

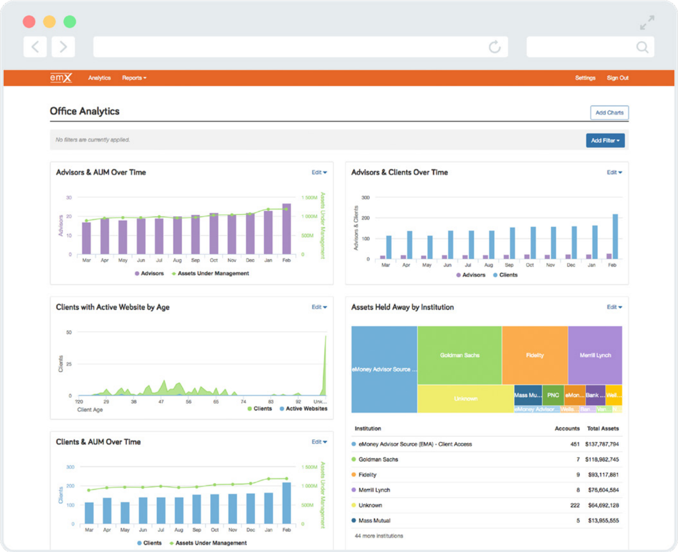
### FILTERS

- Client Name
- Client Group
- Client Age Group
- Account Type
- Institution
- Account Value
- Cash Balance
- Account Holdings Value
- Cost Basis
- Account Connection Status

# OFFICE ANALYTICS

**(For Office Managers)**

Office managers can now evaluate performance and engagement across the entire firm and client base from within a single dashboard. Access over 40 charts designed to drive more effective advisor meetings, assess usage rates, and uncover your firm's most pressing opportunities.




Customizable dashboard

Available to office managers

Add-on product

Ability to export chart data

Charts:

## BUSINESS OPPORTUNITIES

- Assets Held Away by Account Type
- Assets Held Away by Institution
- Asset Status
- Liability Status
- Liabilities Held Away by Account Type
- Liabilities Held Away by Institution
- Top Clients by Assets Held Away
- Top Holdings Held Away
- Top Clients by Net Worth
- Life Insurance Held Away by Policy Type

## FIRM TRENDS

- Assets Under Management by Account Type
- Assets Under Management by Institution
- Assets Under Management Over Time
- Clients and Assets Under Management Over Time
- Clients Over Time
- Asset Status
- Liabilities Status
- Top Clients by Assets Under Management
- Top Holdings Under Management
- Life Insurance Under Management
- Liabilities Under Management by Institution
- Life Insurance Policy Anniversary by Month
- Top Offices by Assets Held Away
- Top Offices by Assets Under Management

## ADVISOR TRENDS

- Advisors and Assets Under Management Over Time
- Advisors and Clients Over Time
- Advisors Over Time
- Top Advisors by Assets Held Away
- Top Advisors by Assets Under Management

## CLIENT ENGAGEMENT

- Client Website Last Logon
- Client Websites
- Marketing Views by Link Type
- Top Marketing Pieces
- Client Logins Over Time
- Top Clients by Logins

## CLIENT DEMOGRAPHICS

- Clients by Age Group
- Clients with Active Websites by Age

## COMPLIANCE

- Fiduciary Rule – Retirement Assets Under Management
- Fiduciary Rule – Retirement Assets Held Away
- Fiduciary Coverage

## CLIENT MATERIAL

- Presentations
- Scenarios
- Vault Files

## FILTERS

- Office
- Advisor Name
- Client Name
- Client Group
- Client Age Group

**Call us today to schedule your free trial.**

**1-888-362-4612**

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