

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.

Which option is right for you?

PLUS

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

INCLUDES:

- Platform
- Advanced Analytics
- Foundational Planning

PRO

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

INCLUDES:

- Platform
- Advanced Analytics
- Advanced Planning

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
- Advanced Analytics
- Foundational Planning
- Advanced Planning

GROWTH

Supercharge the growth of your planning business with an integrated marketing solution that makes it easy to attract prospects and create plans—all from one place

INCLUDES:

- Choice of Planning Package + Bamboo

Learn what's included in Foundational Planning and Advanced Planning through the product comparison below.



FOUNDATIONAL PLANNING Available in Plus and Premier

ADVANCED PLANNING Available in Pro and Premier

Features

Features	FOUNDATIONAL PLANNING Available in Plus and Premier	ADVANCED PLANNING Available in Pro and Premier
Cash Flow Planning		✓
Goal-centric Planning	✓	
Education Planning	✓	✓
Retirement Planning	✓	✓
Investment Planning	✓	✓
Stock Options		✓
Tax Planning		✓
Estate Planning		✓
Insurance Planning	✓	✓
Custom Capital Market Assumptions	✓	✓
Monte Carlo Based Results	✓	✓
Stress Tests		✓
Reports	✓	✓
Custom Presentation Templates		✓
Bamboo	Add-On	Add-On
Advisor Assurance	Add-On	Add-On

eMoney's Platform includes:

Account Aggregation	✓	✓
Client Portal	✓	✓
Client Onboarding	✓	✓
Third-party Integrations	✓	✓
Screen Sharing	✓	✓
Digital Lead Capture	✓	✓
Unlimited Digital Document Storage	✓	✓
Award Winning Customer Service	✓	✓
Alerts, Alarms and Tasks	✓	✓

