

Most Comprehensive Set of Planning Capabilities

Demonstrate complex, real-world scenarios over a client's entire lifetime with a comprehensive planning solution.

Key Features:

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



With Advanced Planning, you can:

Model the Future

Provide clients with in-depth and personalized views into their financial pictures 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 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. Work together to create strategies to better protect their legacies.

Want to learn more? Visit us at www.emoneyadvisor.com or call 888-362-4612 to schedule your free trial.