

Media Kit

2026





Table of Contents

- 3 About eMoney
- 3 Our Story
- 4 Leadership Team
- 9 eMoney Product Information

About eMoney

eMoney provides technology solutions and services that help people talk about money. Rooted in comprehensive financial planning, eMoney's solutions strengthen client relationships, streamline business operations, enhance business development and drive overall growth. More than 138,000 financial professionals across firms of all sizes use the eMoney platform to serve more than 7 million households throughout the U.S.

-  **Mission:** Helping people talk about money
-  **Vision:** Financial peace of mind for all

Our Story

Founded in 2000 as a startup, eMoney Advisor's initial products—an advisor dashboard, aggregator, and document vault—were the first on the market to transform the financial planning experience and help financial services catch up to other industries using interactive, collaborative technology.

In its first five years of operating, eMoney grew to 50 employees and served 500 financial professionals. In 2015, eMoney was acquired by Fidelity Investments. Today, the firm continues to grow with more than 600 employees in 40 states, and eMoney's solutions have evolved to comprise a robust planning-led platform complimented by award-winning customer service and support.

eMoney at-a-Glance



7.1M

Households



2.4M

Client Sites



55.9M

Aggregated Accounts



138.4K

Financial
Professionals



\$10.5T

Assets Under
Management

Our Leadership Team



Susan McKenna

CEO

As CEO, Susan oversees the execution of eMoney's vision and business strategy in addition to managing its cross-functional, core leadership team. Before being named CEO in 2022, Susan was eMoney's Head of Marketing and Sales, where she led all activities that accommodate the underlying demand for financial advice, drive revenue and growth, and increase brand awareness.

Susan joined eMoney in 2018 with an extensive background in leadership and aiding companies to grow and scale. She has more than 30 years of experience, specifically in software and services for both major global market leaders and smaller, rapid growth businesses. Prior to joining eMoney, she held senior positions at Billtrust, Revitas (sold to Model N), Princeton Softech (sold to IBM), and Deloitte. Susan graduated from Drexel University with a bachelor of science in marketing.



Nicholas J. DiLisi Jr.

Head of Technology

As Head of Technology, Nick oversees software development and IT operations for the company. As one of the pioneering employees who co-founded eMoney in 2000, he also served as Chief Information Officer. You can say Nick's contributions to eMoney's core products give them the "X" factor not found in other financial platforms.

Prior to his career at eMoney, Nick was Vice President of Development at VerticalNet, Inc. where he was responsible for building the firm's technology group, as well as the migration and implementation of the technology used to power nearly five dozen B2B communities. He also served as the Vice President of Presentation Systems at Reality Online, a Reuters company. In that role, he oversaw the technical development of internet and client/server applications and was responsible for Reality's core technology and the suite of applications under the award-winning Reuters Money Network product line.

Nick earned a bachelor's degree in computer science from Drexel University in 1988.



Christian Solomine

Head of Sales

As Head of Sales, Christian leads all sales efforts across the organization to drive growth and generate revenue. He's responsible for increasing both advisor and enterprise sales opportunities, improving sales efficiencies, and strengthening client relationships while overseeing multiple teams, including advisor and enterprise sales, relationship and account management, and sales operations.

Christian joined eMoney on a fractional basis as chief revenue officer in September 2024. He brings more than 20 years of experience leading sales and marketing teams for SaaS companies. Most recently, he served as founder and CEO of a fractional CRO practice, helping technology firms and startups grow their businesses and solve go-to-market challenges.

Christian graduated from James Madison University with a Bachelor of Science in integrated science and technology. He also earned his MBA and MS in information technology from the University of Denver.



Jason Novak

Head of Information and Security

As Head of Information and Security, Jason leads a team responsible for all information systems, management, and processing within eMoney, working to maintain the confidentiality, integrity, and availability of organizational data. In addition to leading corporate operations, production operations, and security, Jason oversees enterprise applications, risk, and privacy initiatives.

Jason joined eMoney in 2014, previously serving as senior vice president of security and IT operations and director of security. With more than 20 years of information technology and security experience, he relies on diversified technical knowledge and training in numerous aspects of information technology and security, including IT infrastructure design and operations, cybersecurity, vulnerability assessments, penetration testing, social engineering, IT audit, risk management, compliance, quality assurance, business continuity, and disaster recovery. He's also proficient in AICPA SOC 2 compliance, Payment Card Industry (PCI) Data Security Standards, and various NIST and ISO information technology frameworks.

Additionally, Jason is Certified in Risk and Information Systems Control (CRISC) and is a Certified Information Systems Security Professional (CISSP), Certified Information Systems Auditor (CISA), and Certified Information Security Manager (CISM). He is a member of the Information Systems Audit and Control Association (ISACA) and International Information Systems Security Certification Consortium, Inc. (ISC)². He is a graduate of Muhlenberg College.



Joanne Del Signore

Head of People Experience

As Head of People Experience, Joanne plays an essential role in creating and nurturing eMoney's strong culture, one that lets people perform at their best while achieving strategic objectives. She leads an exceptional team that supports eMoney's most important asset—its people—and the functions that help the organization thrive, including talent management, diversity and inclusion, employee relations, talent strategy, learning and development, and total rewards. She works with business leaders to build and manage a People Experience organization that reflects and supports the dynamic needs of the business.

Joanne joined eMoney in 2018 with an extensive background in leadership and talent management. She has more than 20 years of experience in human resources with a focus on the financial and pharmaceutical sector. Joanne has contributed to organizations during times of explosive growth and helped to onboard and train the talent needed to move the firm forward. Prior to joining eMoney, she held senior positions in talent acquisition and recruitment at AmerisourceBergen, TD Bank, and Sovereign Bank.

Joanne earned a bachelor's degree in history from Villanova University.



Frank Tropiano

Head of Client Services

As Head of Client Services, Frank leads more than 200 employees dedicated to customer service, implementation, training, coaching, and client support. His previous experience as Head of Product for eMoney combined with eMoney's award-winning customer service ensure that Frank and his team can help eMoney's users maximize their experience and understanding of the eMoney platform to support business growth. He also serves on eMoney's core leadership team.

Frank joined the company in 2002 and has spent his 30-year career focused on the development of financial applications, including online brokerage trading and e-commerce systems. He previously served as Regional Operating Officer and Director of eSolutions for Breakaway Solutions, Inc., an internet consulting company and application service provider. Prior to joining Breakaway, Frank held various leadership roles at Reality Online, a Reuters company, including Vice President of Reuters Web Development, Vice President of Development, Director of Content Services, Director of Data Center Operations, and Director of Macintosh Products.

Frank earned his bachelor's degree in computer science from Drexel University in 1988.



Tom Sullivan

Head of Product

As head of product, Tom is responsible for setting and executing eMoney's product strategy. In this role, he oversees more than 50 employees dedicated to the evolution, development, and user experience of eMoney's robust portfolio of products—helping to deliver a comprehensive suite of solutions that creates a powerful experience across the platform.

Tom relies on more than 20 years of SaaS experience and leadership. Before joining eMoney in 2022, he served as chief product and strategy officer at Os33; as managing director of product strategy at Tangoe; and as vice president of product management and strategy at Sparta Systems. He also served as vice president and managing director for Albridge Solutions, the market leader for enterprise data consolidation and real-time performance reporting solutions throughout the financial services industry. During his more than 10 years at Albridge, Tom was responsible for managing and leading several functions, including product management, marketing, new business development, and relationship management. Earlier in his career, he worked as a financial advisor at Smith Barney/Paine Webber.

Tom earned his bachelor of science in finance and marketing from Villanova University.



Rachel Eccles

Head of Marketing

As Head of Marketing, Rachel leads a passionate, creative, and customer-focused team that is committed to advancing eMoney's mission of helping people talk about money. She oversees all areas of the company's brand awareness and demand generation initiatives with a focus on driving customer acquisition, retention, and revenue growth.

Rachel joined eMoney in 2017 with an extensive background in B2B marketing, leading high-performing teams and delivering differentiated brand experiences. She has more than 15 years of experience working with organizations of all sizes to design and execute integrated and performance-driven marketing strategies that connect audiences, elicit emotion, and drive growth and market share.

Rachel graduated from the University of Massachusetts, Amherst with a bachelor's degree in English.



Fred Pattin

Head of Finance

As Head of Finance, Fred leads eMoney's financial planning and analysis, strategy, accounting, billing, facilities management, legal, and enterprise project management functions. He and his team ensure that eMoney continues to grow and scale responsibly while maintaining operational excellence and financial discipline.

Prior to joining eMoney, Fred held senior finance leadership roles at global organizations including Trimble, Hasbro, Time Warner Telecom, and First Data. He also served as CFO for several private equity-owned companies, where he focused on scaling technology and SaaS businesses for sustainable growth. Earlier in his career, Fred worked at a Big Four accounting firm.

Fred earned a bachelor of science degree in Accounting from Bob Jones University and is a Certified Public Accountant.

eMoney Product Information

Solutions to Grow and Scale Your Business

eMoney provides scalable solutions that meet a broad range of planning needs so financial professionals always have the right tool for any situation. We offer three packages that align with the type of planning financial professionals offer along with [integrations with industry-leading fintech providers](#). eMoney also provides clients direct access to our award-winning support teams to help answer questions as well as client onboarding, training, coaching, and additional professional services. [Learn more](#) →

eMoney **Plus**

A streamlined, goals-based financial planning solution for building more planning relationships while quickly delivering more plans to more clients.

Perfect for advisors who need:

- ✓ to be able to quickly create a plan
- ✓ a solution to serve clients with basic needs
- ✓ a scalable, personalized client experience

eMoney Plus Includes:

- ✓ Topical Planning
- ✓ Goals-based planning
- ✓ CoPlanner
- ✓ Client Portal
- ✓ Market-leading account aggregation
- ✓ Spending and budgeting tools
- ✓ Insights and data
- ✓ Secure file sharing and storage
- ✓ Business analytics
- ✓ Powerful integrations

[Learn more](#) →

RECOMMENDED

eMoney **Premier**

Goals-based and cash flow planning solutions in a single platform that enables planning for all clients regardless of financial situations.

Perfect for advisors who need:

Best value

Plus + **Pro**

eMoney Premier Includes:

- ✓ Topical Planning
- ✓ Goals-based planning
- ✓ Cash flow-based planning
- ✓ CoPlanner
- ✓ Premium Client Portal
- ✓ Market-leading account aggregation
- ✓ Spending and budgeting tools
- ✓ Insights and data
- ✓ Secure file sharing and storage
- ✓ Business analytics
- ✓ Powerful integrations

[Learn more](#) →

eMoney **Pro**

The most comprehensive cash flow financial planning solution for addressing clients' most complex planning needs.

Perfect for advisors who need:

- ✓ to support clients who have complex planning situations
- ✓ robust tools that match the high level of planning provided
- ✓ interactive planning technology to help clients visualize the impact of their decisions

eMoney Pro Includes:

- ✓ Topical Planning
- ✓ Cash flow-based planning
- ✓ CoPlanner
- ✓ Client Portal
- ✓ Market-leading account aggregation
- ✓ Spending and budgeting tools
- ✓ Insights and data
- ✓ Secure file sharing and storage
- ✓ Business analytics
- ✓ Powerful integrations

[Learn more](#) →

Media Contact

Joanna Armandi, Corporate Communications, eMoney
jarmandi@emoneyadvisor.com | 215.990.1469