

Drive Success Through a Comprehensive, Collaborative Wealth Management Platform

Grow your firm by meeting a wide range of client planning needs with our comprehensive and scalable platform. eMoney includes valuable analytics to help you identify growth opportunities and deepen client engagement. Available in packages to meet your firm's unique needs, eMoney will transform your ability to deliver expert advice and grow your business.

WHICH OPTION IS RIGHT FOR YOU?

PLUS



Platform

Advanced Analytics

Foundational Planning

A streamlined planning solution that allows advisors to build planning-led relationships and deliver more plans to more clients.

PRO



Platform

Advanced Analytics

Advanced Planning

The most comprehensive set of advanced planning capabilities available to accommodate complex financial needs.

PREMIER



Platform

Advanced Analytics

Foundational Planning
& Advanced Planning

A fully integrated solution that enables planning for all clients regardless of their financial situation.



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



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		✓
Advisor Branded Marketing	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	✓	✓

For more information on the options available, contact a member of our sales team by Email: sales@emoneyadvisor.com | Phone: 1 888-362-4612



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