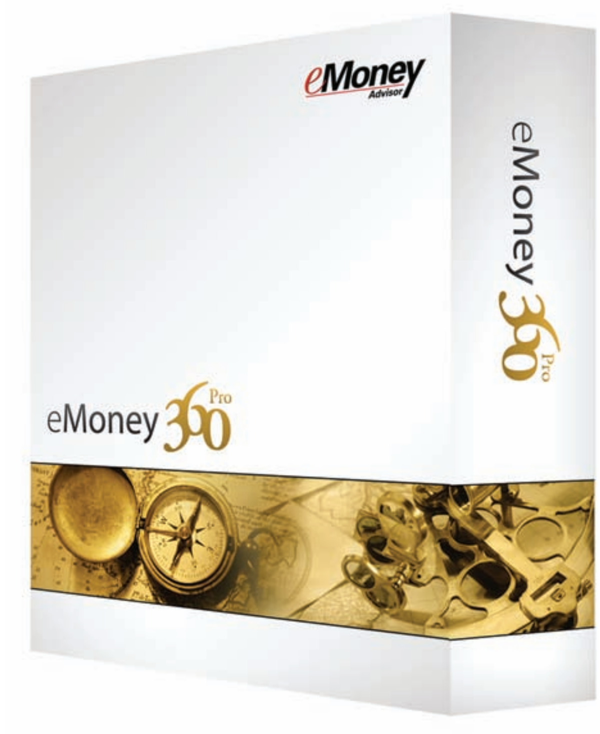
# eMoney 360 Pro

Financial Planning & Wealth Management

INCREASE
GROW **DIFFERENTIATE**
**COMMUNICATE** KNOW MORE
**COLLABORATE** **SCALE**
STREAMLINE **DO MORE**
**ADVOCATE** **SEE MORE**
**AGGREGATE** ORGANIZE
**PROSPER**




eMoney 360 Pro offers advanced planning technology for a competitive advantage in the high net worth market.

Create comprehensive plans with over 200 comparative analysis reports. Deliver your recommendations to clients in their own personal financial website, available only through you. All account balances are tracked and updated daily. See current values of all your clients' holdings, even assets held away.

Our unique online platform connects you and your client to their complete financial picture. The more you know, the better you can advise…and the deeper your client relationships will be.

If you're looking for a competitive advantage to attract and retain top-tier clientele, you just found it. It's called eMoney 360 Pro.

**ATTRACT** new clients

**RETAIN** existing clients

**INCREASE** managed assets

**SCALE** your practice

**GROW** revenue

eMoney Advisor

For more information, visit **emoneyadvisor.com** or contact us at 1-888-362-4612.

# eMoney 360 Pro

## 1 Connect

Connect client assets, even those you don't manage, into a Personal Client Website for increased visibility and advisor/client collaboration.

## 2 Plan

Plan for the client's short and long-term financial goals with Advanced Planning – offering over 200 high-impact reports for comparative analysis.

## 3 Prosper

Present your advice and product recommendations with compelling client presentations that illustrate the impact of your proposal.

# Unique **Features**

- **Financial Connections** for a holistic view of all your clients' accounts updated nightly
- **Alerts and Alarms** to notify you of significant changes
- **Personal Client Website** offering 24/7 client access
- **Data Integration** fully integrated with other advisor tools
- **Needs Analysis** thirteen financial analysis modules for evaluating specific client needs
- **The Vault** for secure, on-line storage of important documents and mementos
- **Mobile Access** via iPhone, Blackberry, Android and more
- **Alliance Partnerships** for increased collaboration with attorneys, accountants, or other trusted advisors
- **TouchPoint** to convey important business and personalized messages to clients
- **Financial Concepts** to increase sales by illustrating the benefits of a variety of wealth management concepts
- **Advanced Planning Center** for detailed financial planning
- **Investment Planning** to generate investment proposals and policy statements
- **Organization Manager** to oversee an organization's financial situation
- **Retirement Income** to provide a specific client presentation to those preparing for retirement
- **Opportunity Reports** will mine your client data for more revenue
- **Express Data Entry** for quick and accurate entry
- **Extensive Reporting** for the ultimate flexibility in client reporting