eMoney 360
Needs Analysis & Wealth Management

eMoney 360 Pro
Financial Planning & Wealth Management

Unique Features

		360	360 Pro
	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		✓

ATTRACT new clients

RETAIN existing clients

INCREASE product sales

SCALE your practice

GROW revenue

eMoney Advisor

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