



Distinguishing Yourself in the Market Place

Agenda

Welcome!

As an advocate for financial planning, you need to know the distinctive planning features of the eMoney system. This class is designed to teach you leading practices such as, client communication, branding, and back office management. You will leave here today with a sense of how eMoney can help you transform your business and gain a competitive advantage.

10:00-10:15 Objectives

10:15-10:45 Module 1 Getting Started with eMoney

- 7 Steps of Success

10:45-12:00 Module 2 Effective Client Communication

- Marketing to Clients
- Branding videos
- Funneling into your corporate website
- Templates for emails

12:00-12:45 Lunch

12:45-1:15 Module 3 What's in it for them?

- When/if you show a client their website (samples)
- Security

1:15-1:45 Module 4 Gathering Data

- Fact Finder Branding
- Interrogate verses conversation

1:45-2:00 Break

2:00-2:45 Module 5 Next Steps

- Leading practices
- Alerts
- Market to Alliance Partners
- Vault

2:45-3:00 Module 6 Building Infrastructure

- Transform your practice
- Back office structure- client communication