

The logo for emX, featuring the lowercase letters 'em' in a blue sans-serif font, followed by a large 'X' in a bold, blue, stylized font. The 'emX' is framed by two horizontal blue lines, one above and one below.

INTEGRATION UPDATE

FEATURING

The logo for Orion Advisor Services, LLC. It features a blue asterisk-like icon to the left of the word 'ORION' in a bold, black, sans-serif font. Below 'ORION' is the text 'ADVISOR SERVICES, LLC' in a smaller, black, sans-serif font.

Work Smarter, Not Harder

Speakers

- **eMoney Advisor**
 - Kyle Wharton: Head of Business Development
 - Alex Rines: Integrations Developer
 - Kate Summers: Business Analyst
- **Orion**
 - George Svagera: VP of Business Development
 - Jeff Kliwer: Head of Tech Support

Agenda

- **Our Story:** *Why eMoney and Orion*
- **Get Started:** *Accessing the Integration in emX*
- **Product Overview:**
 - *Orion*
 - *emX*
- **How it Helps:** *Why This Integration Benefits You*

Our Story

Why eMoney and Orion

- **Who We Work With:**
 - Large overlap in user base
- **Similar Goals:**
 - Making advisors' businesses more efficient through integrated technology offerings
 - Simplify an advisor's day-to-day operations

Get Started

Accessing the Integration in emX

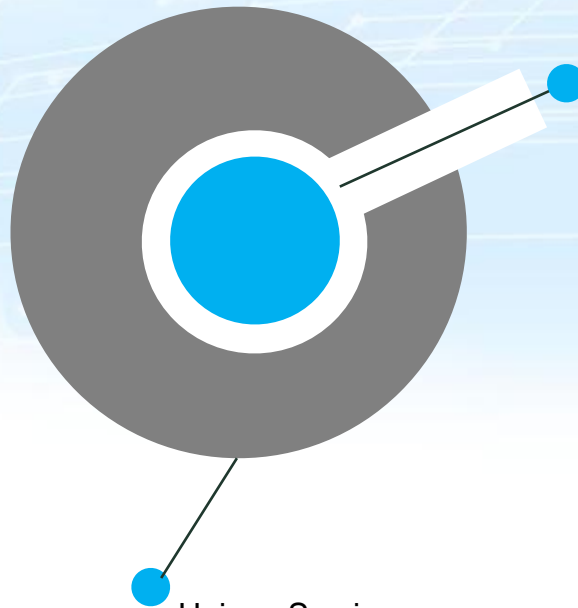


emX

Product Overview

Orion





Core Services

- ✦ Account aggregation & reconciliation across multiple custodial & brokerage platforms
- ✦ Tax lot accounting
- ✦ Full suite of customized ad-hoc performance, valuation, and cost basis reports
- ✦ Web based access with multiple log in levels
- ✦ Advisory fee notices, payable reports, & fee list uploads
- ✦ Historical Data Conversions

Unique Services

- ✦ Private-labeled statements posted online, printed, & mailed with video
- ✦ Trade Order Management w/ FIX
- ✦ GIPS Compliant Composite Calculations
- ✦ Compliance and Audit Report Generation
- ✦ Business Metric Reports
- ✦ Web Service (API Integrations & Full Data Exports)
- ✦ Advisor Branded mobile apps (Apple, Android, Windows Phone)
- ✦ SSAE Type II & ISO 27001 certified
- ✦ Report Builder & Theming
- ✦ Salesforce, Redtail, Junxure, Microsoft Dynamics CRM integrated
- ✦ Box/Dropbox integration with portals
- ✦ Disaster Recovery Plan
- ✦ Asset class customization
- ✦ AdvisoryWorld analytical data
- ✦ Video Statements via Engage
- ✦ New Accounts via Discover
- ✦ Email campaigns via Deliver

Equipping Your Practice with Necessary Technology Solutions

Reporting

Customizable | Unique | Accessible

Advisory Fee Billing

Robust | Easy to Manage | End-to-end Process

Trade Order Management

One Location for all Trades | Mobile Ready | Virtual Accounts



Streamline the Onboarding Process

Breaking Down Barriers: Asking for their business

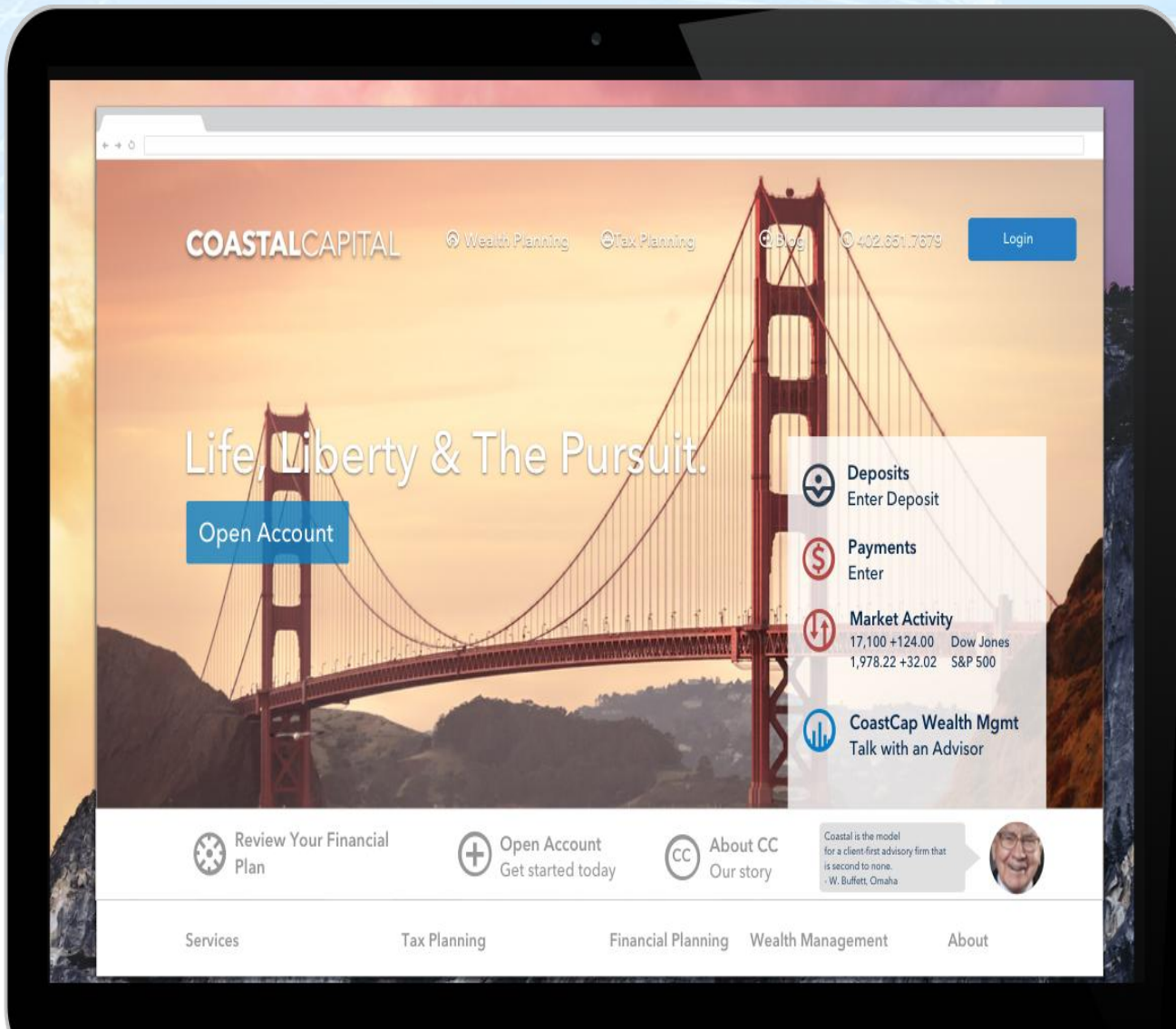
LOOKS GREAT! OPEN MY ACCOUNT



Discover

New Account Opening Made Simple





COASTALCAPITAL

Wealth Planning

Tax Planning

Blog

402.651.7679

Login

Life, Liberty & The Pursuit.

Open Account



Deposits

Enter Deposit



Payments

Enter



Market Activity

17,100 +124.00 Dow Jones
1,978.22 +32.02 S&P 500



CoastCap Wealth Mgmt

Talk with an Advisor



Review Your Financial
Plan



Open Account
Get started today



About CC
Our story

Coastal is the model
for a client-first advisory firm that
is second to none.
- W. Buffett, Omaha



Services

Tax Planning

Financial Planning

Wealth Management

About

Implement More Effective Communication



 **DELIVER**

Integrations



Open API
Analytics & Reports
Account Aggregation
CRM
Financial Planning
Trading

+ More



*ORION

About eMoney

At-A-Glance

Who We Are:

- Founded: 2000
- CEO: Edmond Walters
- Corporate HQ: Conshohocken, PA
- Aggregated Assets on System: \$1.4T
- Employees: 270
- Clients: 25,000+ Top Financial Professionals

Who We Work With:



of top Broker-Dealers in
the U.S. use eMoney



of the top insurance companies
in the U.S. use eMoney

eMoney also serves an extensive network of independent RIAs,
banks and planning professionals.

What We Do:

We build the leading wealth-planning software for financial professionals.

In December 2014 eMoney released emX, the completely reengineered version of our award-winning technology platform.

Product Overview

emX: It's a Better Way of Doing Business

Improve Your Workflow

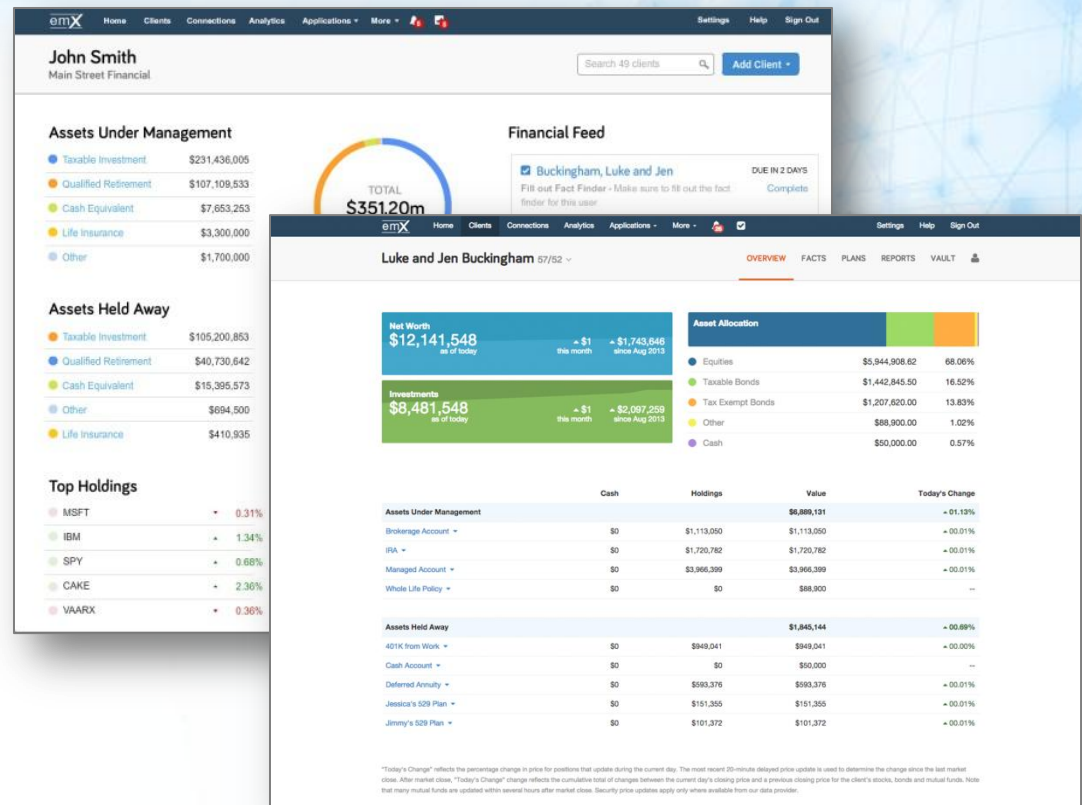
- A more intuitive interface
- Tools to improve efficiency
- emX streamlines your operations so you work smarter, not harder

Strengthen Relationships

- Help your clients organize their financial lives with their own digital PFM
- Keep them connected not only to their finances, but also to you

Grow Your Business

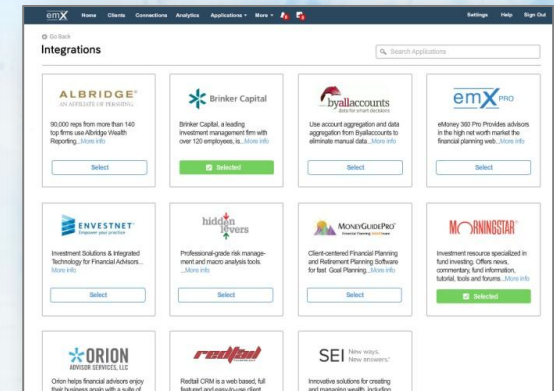
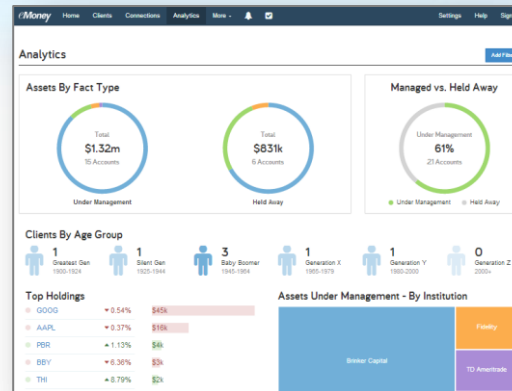
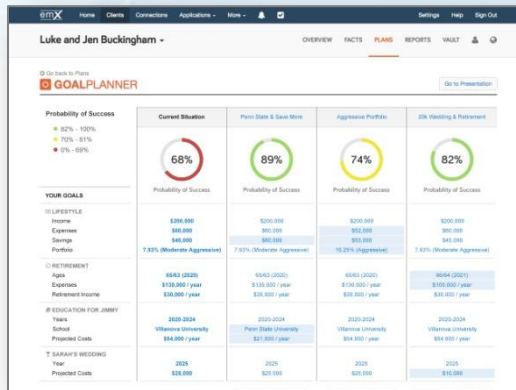
- Leading-edge technology that, combined with your expertise, differentiates you from your competition
- Positions you for future success and allows you to lead the life—and leave the legacy—you envision



Today's Change reflects the percentage change in price for positions that update during the current day. The most recent 35-minute delayed price update is used to determine the change since the last market close. After market close, *Today's Change* change reflects the cumulative total of changes between the current day's closing price and a previous closing price for the client's stocks, bonds and mutual funds. Note that many mutual funds are updated within several hours after market close. Security price updates apply only when available from our data provider.

Product Overview

emX: It's a Better Way of Doing Business



New Financial Planning Tools

- Planning tools to support your clients' planning needs throughout their entire life cycle
- From goal-based planning to complex estate and retirement income planning considerations

Powerful Business Analytics

- More insight into your book of business than ever before
- In-depth analytics to help you identify opportunities and make sense of your business

Fully-Integrated Platform

- Create a fully-integrated operating platform
- Featuring direct and seamless access to many of the industry's top financial applications

How it Helps

Why This Integration Benefits You

The screenshot displays the emX Select application interface. At the top is a dark navigation bar with the emX logo and menu items: Home, Clients, Connections, Analytics, Applications (with a dropdown arrow), and More (with a dropdown arrow). There are also notification and checkmark icons. Below the navigation bar, a breadcrumb link says "Go back to Home" followed by the "emX Select" title. The main content area features a 2x3 grid of partner cards. Each card contains a logo, a brief description of the partner's services, and a "More info" link. At the bottom of each card is a "Select" button.

<p>ALBRIDGE™ AN AFFILIATE OF PERSHING</p> <p>Albridge Wealth Advisor, a leading provider of enterprise data management solutions, and eMoney have partnered to make... More info</p> <p>Select</p>	<p>INVESTNET™</p> <p>Investnet, a leading provider of integrated portfolio, practice management and reporting solutions to financial advisors and... More info</p> <p>Select</p>	<p>hidden levers</p> <p>HiddenLevers, the premier portfolio stress testing platform, and eMoney have partnered together to simplify wealth planning... More info</p> <p>Select</p>
<p>MORNINGSTAR® Advisor Workstation™</p> <p>Morningstar®, the industry's leading provider of independent investment research, and eMoney are working together to simplify... More info</p> <p>Select</p>	<p>*ORION</p> <p>The integration of Orion Advisor Services, LLC, the premier portfolio accounting service provider for advisors, with eMoney... More info</p> <p>Select</p>	<p>REDTAIL</p> <p>Redtail Technology, a leading provider of web-based Client Relationship Management (CRM), and eMoney are working... More info</p> <p>Select</p>

Learn More

- **Clients:**

eMoney Advisor

Call: + 888 362-8482

Email: engagement@emoneyadvisor.com

Orion

Call: + 402-496-3513

Email: empower@orionadvisor.com

- **If you're interested in learning how eMoney and Orion can help your firm:**

eMoney Advisor

Visit: www.emoneyadvisor.com

Call: + 888 362-4612

Email: sales@emoneyadvisor.com

Orion

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Call: + 402-496-3513

Email: empower@orionadvisor.com