



emX

INTEGRATION UPDATE

FEATURING

riskalyze

Speakers

- **eMoney Advisor**
 - Megan McKinney: Regional Sales Manager
 - Heather Blair: Product Manager
- **Riskalyze**
 - Ben Mavy: Managing Director, Enterprise Solutions

Agenda

- **Our Story:** *Why eMoney and Riskalyze*
- **Get Started:** *Accessing the Integration in emX*
- **Product Overview**
 - *Riskalyze*
 - *emX*
- **Live Q&A**

Our Story

Why eMoney and Riskalyze

- **Similar Goals**
 - Simplify an advisor's day-to-day operations
 - Strengthen client relationships
 - Empower advisors to exceed expectations

Get Started

Accessing the Integration in emX



[click here](#)

About Riskalyze

**Show prospects they're invested wrong.
Prove to clients they're invested right.**



Riskalyze Solutions



Show prospects they're invested wrong and prove to clients they're invested right. Riskalyze enables advisors to pinpoint an investor's Risk Number™ and build a portfolio that contains just the right amount of risk.



Next-generation client self-service combined with automated asset management for financial advisors. Autopilot empowers you to profitably serve clients, large and small, by offering a tiered service model.



Eliminate the need to spot check with big data analytics. Compliance Cloud searches your entire book of business for compliance issues and flags accounts that need attention, enabling you to tackle the most important issues first.

Riskalyze Overview

- ▶ Quantitatively pinpoint risk
- ▶ Powerful portfolio analytics engine
- ▶ Build portfolios to match client risk preference
- ▶ Expose risk and win clients



About eMoney

At-A-Glance

Who We Are:

- Founded: 2000
- CEO: Edmond Walters
- Corporate HQ: Conshohocken, PA
- Aggregated Assets on System: \$1.7T
- Employees: 300+
- Clients: 28,000+ 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.

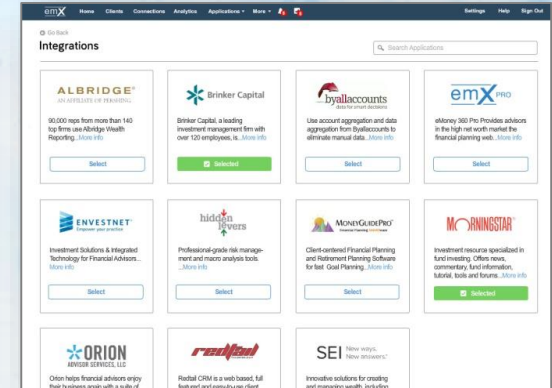
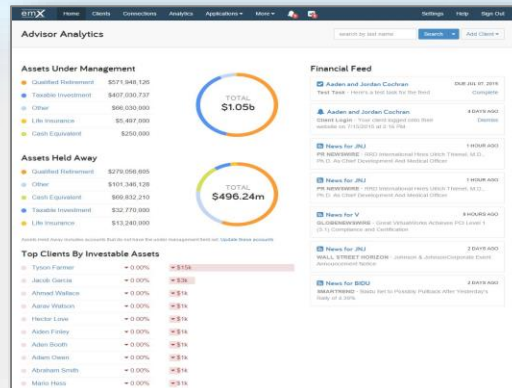
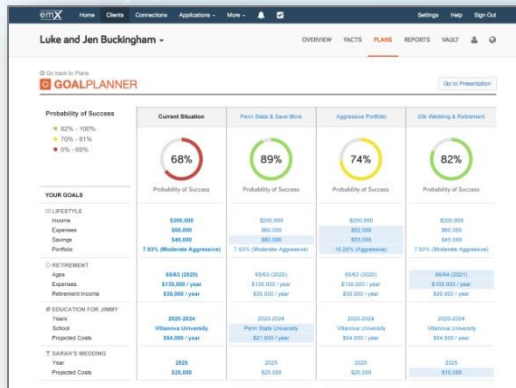
What We Do:

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



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.

Learn More

- **Clients:**

eMoney Advisor

Call: 888 362-8482

Email: customerservice@emoneyadvisor.com

Riskalyze

Call: 855-RISKALYZE

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

eMoney Advisor

Visit: emoneyadvisor.com

Call: 888 362-4612

Email: sales@emoneyadvisor.com

Riskalyze

Visit: riskalyze.com

Call: 855-RISKALYZE

Email: sales@riskalyze.com



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