emX

INTEGRATION UPDATE

FEATURING

riskalyze

Questions and Answers

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Q. What is Riskalyze?
A. Riskalyze is the company that invented the Risk Number™, the first-ever quantitative way to capture client risk tolerance, align portfolios to client expectations, and quantify the suitability of investments. Riskalyze was named one of the world's ten most innovative companies in finance, and advisors use the platform to manage $90 billion in assets. To learn more, visit www.riskalyze.com.

Q. I have a subscription to Riskalyze. What features will be available to me as part of this integration with emX?
A. The integration of Riskalyze with eMoney Advisor creates a seamless, easy way for eMoney clients to utilize Riskalyze's quantitative measurement of client risk tolerance from within emX. Accessible through single sign-on access, eMoney advisors are able to link or import clients, access a client's risk number as well their current portfolio risk directly from the emX Client Overview page, and update their clients' risk number with easy access to the Riskalyze questionnaire from the Client Overview page.

Q. I am currently not an Riskalyze subscriber. Are there any features available to me?
A. Access to Riskalyze is limited to shared clients of Riskalyze and eMoney and based on individual enterprise preferences. eMoney users who do not have a Riskalyze Subscription and are interested in one should contact sales@riskalyze.com.

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Q. How do I access the Integration?
A. From the emX Advisor Homepage, find the applications tab and click **Setup** to access the emX Select Page. Here, you will be able to conduct the initial sign-in for all the integration platforms available to you. After this initial sign-in, you can navigate to your integration at any point by clicking **Applications** and selecting **Riskalyze**.

Q. Do all members of my team have access to the Integration features?
A. Only users with an Advisor license will have access to the Riskalyze integration. Access is not currently available with a Planner's or Assistant's license.

Q. Can my clients see their risk number on their client site?
A. Only the advisor is able to view and access the Riskalyze Integration. Clients will not see their risk numbers on their client site.

Q. Does the Riskalyze Risk Number automatically update?
A. Yes, each Riskalyze Risk Number automatically updates whenever you complete a Riskalyze Risk Questionnaire for a client or when you set a Target Risk in Riskalyze. Additionally, Riskalyze Portfolio numbers update whenever you create a new portfolio for a client.

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Q. Does this integration work on both Windows and Mac?
A. Yes, The Riskalyze integration is compatible on both Mac and Windows.

Q. How do I export accounts?
A. To export a client's account or set of accounts, go to their Client Overview page. From there, select **Facts** and then click **Export Accounts**, which is located on the left side of the page. Check off the accounts you want to export and then select the drop-down menu to the right of **Data Format**. Click **eMoney Advisor** and then **Export to Vault**. From there, head over to that same client's vault and choose the **Investments** folder and then select the file you saved earlier.

Q. Who do I call for support if I have a question or issue?
A. eMoney has a dedicated Client Engagement Team staffed with experts and certified professionals whose goal is to ensure that you get the most out of your eMoney experience. They have a range of support options to meet your needs and can be contacted anytime at 888-362-8482 or customersupport@emoneyadvisor.com. With questions specific to Riskalyze functionality, please contact the Riskalyze support team at 855-RISKALYZE.