

emX

INTEGRATION UPDATE

FEATURING



Speakers

- **eMoney Advisor**
 - Drew DiMarino: Executive Vice President of Sales
 - Heather Blair: Product Manager
- **MoneyGuidePro**
 - Will Gilfillan: Enterprise Account Manager

Agenda

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

Our Story

Why eMoney and MoneyGuidePro

- **Platform of Choice**
 - Offering Financial Advisors flexibility
- **Better Financial Plans through Better Data**
 - Making Advisors more efficient
 - Meeting their diverse needs

Get Started

Accessing the Integration in emX



[click here](#)

About eMoney

At-A-Glance

Who We Are:

- Founded: 2000
- 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.

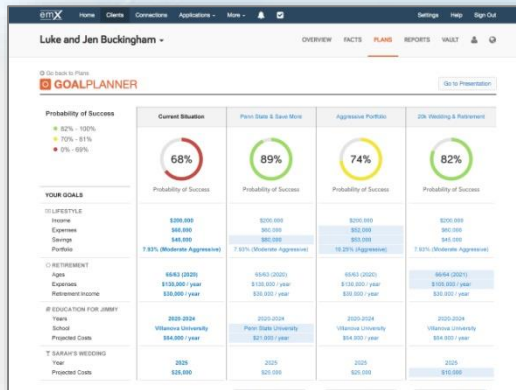
What We Do:

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.

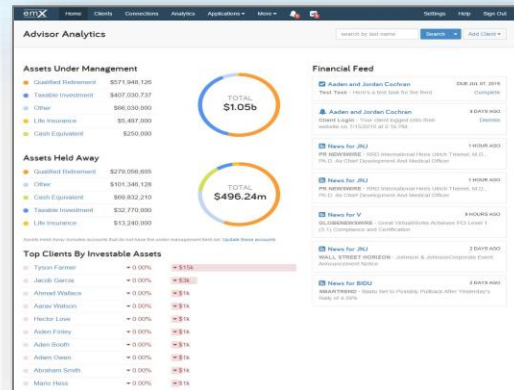
Product Overview

emX: It's a Better Way of Doing Business



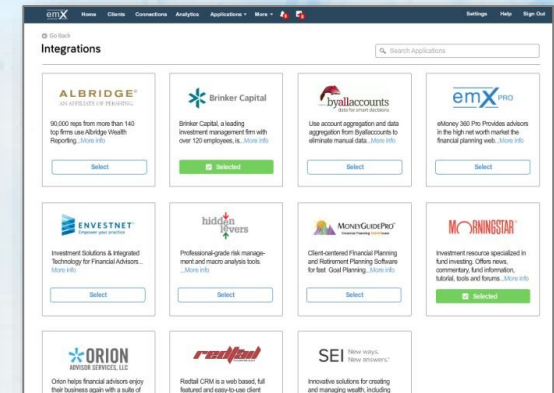
New Financial Planning Tools

- 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

MoneyGuidePro

Call: 800 743-7092

Email: support@moneyguidepro.com

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

eMoney Advisor

Visit: emoneyadvisor.com

Call: 888 362-4612

Email: salesteam@emoneyadvisor.com

MoneyGuidePro

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Call: 800 743-7092

Email: sales@moneyguidepro.com