



I N T E G R A T I O N   U P D A T E

# Speakers

## **eMoney Advisor**

- Jacob Leise: Content Manager
- Heather Blair: Product Manager

## **Riskalyze**

- Josh Rugg: Advisor Solutions Consultant

# Agenda

## 1. Integration Recap

## 2. Demo of Integration Enhancements

## 3. Product Overview

- Riskalyze
- emX Product Suite

# Integration Recap

Phase one of the integration included single sign-on, the Riskalyze Risk questionnaire, linking/importing clients, and client/portfolio risk numbers.

The screenshot displays the emX client dashboard for Ron and Julie Miller. The dashboard includes a navigation bar with 'emX', 'Home', 'Clients', 'Connections', 'Analytics', 'Applications', 'More', 'Settings', 'Help', and 'Sign Out'. Below the navigation, the client name 'Ron and Julie Miller' is shown, along with tabs for 'OVERVIEW', 'FACTS', 'PLANS', 'REPORTS', and 'VAULT'. The main content area is divided into several sections:

- Net Worth:** \$1,917,364 as of today, with a change of +\$27,105 this month and +\$320,638 since Aug 2014.
- Investments:** \$1,052,392 as of today, with a change of +\$20,385 this month and +\$226,032 since Aug 2014.
- Asset Allocation:** A stacked bar chart showing the distribution of assets: Equities (61.85%), Taxable Bonds (26.97%), Tax Exempt Bonds (5.09%), Cash (3.17%), and Other (2.91%).
- Riskalyze Portfolio:** Shows a Risk Number of 85 and a Riskalyze Portfolio score of 75.
- Assets Under Management:** A table listing various accounts and their values.
- Assets Held Away:** A table listing assets held away and their values.

On the right side of the dashboard, there is a sidebar with 'emX Select' and several partner logos: ALBRIDGE, ENVESTNET, MORNINGSTAR, HIDDENLEVERS, and ORION. A risk questionnaire overlay is visible on the right, titled 'Let's talk about retirement.' It includes a 'Next' button and a 'Back' button. The questionnaire asks for the year the user was born (1965) and their retirement age.

Assets Under Management	As Of	Cash	Holdings	Value	Today's Change
Ron and Julie Joint Investment Account	8/12/2015 4:00 PM	\$4,312	\$289,439	\$293,751	▲ 00.18%
Ron's 401K	11/5/2014 10:05 AM	\$2,902	\$438,934	\$441,836	--
Whole Life Policy on Ron	10/22/2014 1:25 PM	\$0	\$0	\$35,500	--

Assets Held Away	As Of	Cash	Holdings	Value	Today's Change
529 Plan for Lucas	11/5/2014 4:00 PM	\$0	\$50,946	\$50,946	--
529 Plan for Mary Beth	11/5/2014 4:00 PM	\$0	\$115,235	\$115,235	--
Cash Account at Vanguard	10/20/2014 4:33 PM	\$0	\$0	\$25,000	--
Every Day Checking	10/20/2014 4:34 PM	\$0	\$0	\$9,365	--
Julie's 403B	10/22/2014 4:00 PM	\$0	\$0	\$143,509	--

# Live Demo: *Integration 2.0*



[click here](#)

# About Riskalyze

Aligning the world's investments  
with each investors Risk Number<sup>®</sup>



# Riskalyze Solutions



Riskalyze enables advisors to pinpoint an investor's Risk Number® and build a portfolio that contains just the right amount of risk.



The only robo with the Risk Number®. Autopilot combines next-generation client self-service with asset management options to empower advisors. Put the hassles of your business on Autopilot and start focusing on your clients again.



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.

# About eMoney

We believe technology should *support*  
**financial advisors, not replace them.**



Serves more  
than **35,000**  
financial  
professionals



Supports  
over  
**1 Million**  
end-clients



Aggregates  
over **\$1.7**  
**Trillion**  
in assets



Employs  
almost **400**  
dedicated  
professionals



**Two offices**  
in Radnor, PA  
and  
La Jolla, CA



# About eMoney

## What's New

**Expanded Product Suite:** The emX product suite now includes three unique, but seamlessly integrated wealth-planning solutions to meet the diverse business needs of our clients.

**New Client Experience:** Delivering many of the best features associated with the leading digital advice platforms within our advisor-centric portal; enhancements include features to automate workflow, create a more engaging experience, and help clients prioritize goals.

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**New Integrations:** Starting with Wealthbox CRM, our platform will continue to streamline the advisor's workflow.

## Coming Soon

**eMoney Knowledge Base:** Interactive, guided training documents and on-screen how-to's to help advisors complete complex tasks quickly and easily.

**Management Analytics:** Designed specifically to meet management needs and challenges by simplifying the planning oversight process and providing firm-level analytics.

# Learn More



INTEGRATION UPDATE

## **eMoney Advisor**

Visit: [emoneyadvisor.com](https://emoneyadvisor.com)

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