eMoney Advisor

riskalyze

INTEGRATION UPDATE

Speakers

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eMoney Advisor

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

Riskalyze

- Josh Rugg: Advisor Solutions Consultant

Agenda

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1. **Integration Recap**
2. **Demo of Integration Enhancements**
3. **Product Overview**
   - Riskalyze
   - emX Product Suite

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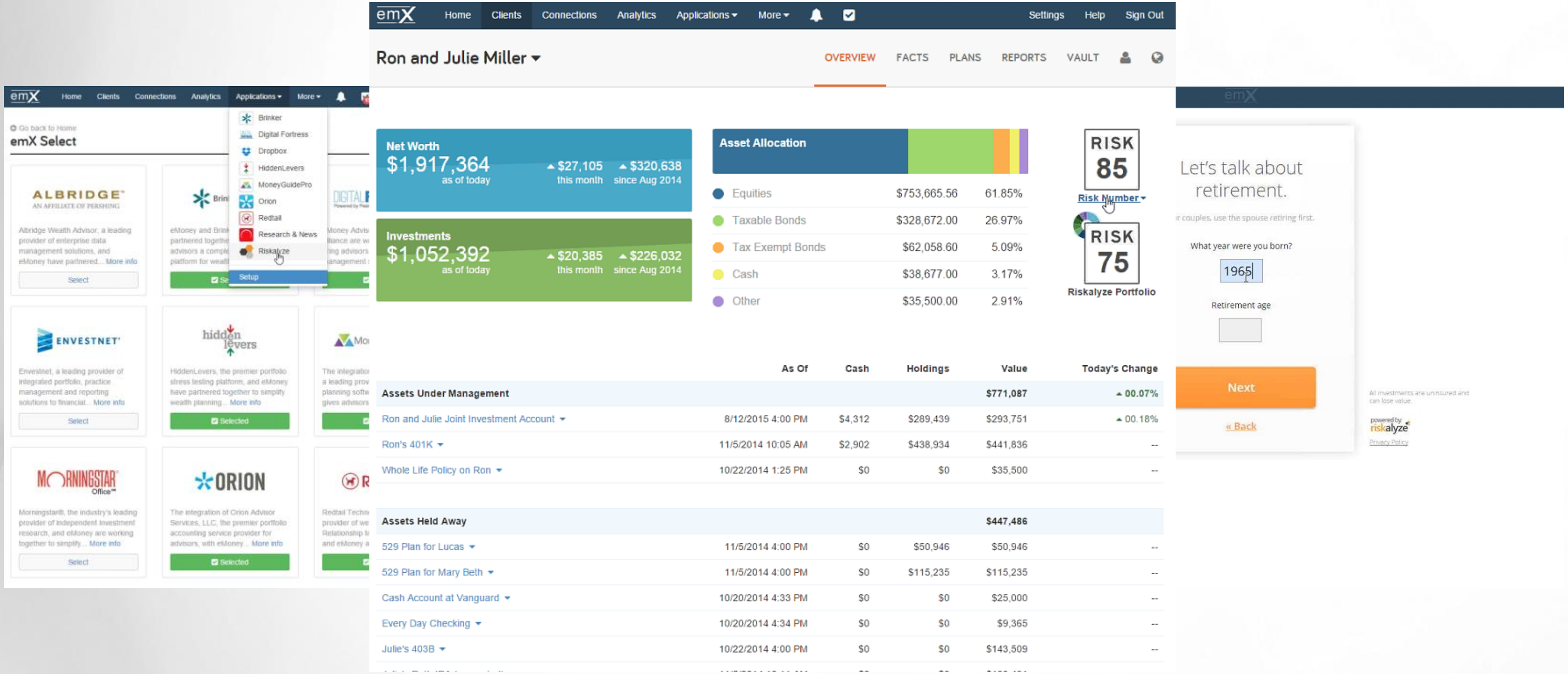
Integration Recap

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



Live Demo: *Integration 2.0*

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[click here]

About Riskalyze

Aligning the world's investments

with each investors Risk Number®

Riskalyze Solutions

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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

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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.

Coming Soon

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

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

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Visit: emoneyadvisor.com
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Riskalyze
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