## *e*Money

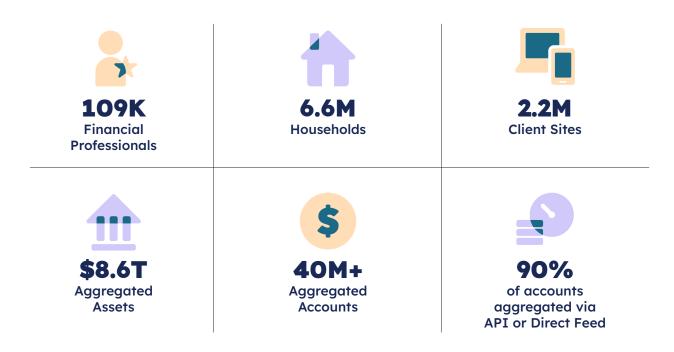
#### **DATA AGGREGATION**

# #1 in Data Aggregation 5 Years Running

eMoney has been ranked as the top aggregation solution for advisors for five consecutive years by the T3/Inside Information Software Survey supporting holistic financial planning through high-quality data aggregation. Since 2009, data aggregation has been an integral feature of the eMoney financial planning platform. Our market-leading data aggregation is available through the eMoney Client Portal, as part of our financial planning packages, or as a standalone solution for firms seeking to enhance their client experiences with our proven capabilities and dependable service.

### **How eMoney Uses Data Aggregation**

eMoney actively aggregates data from 12,000+ institutions to support financial professionals and their clients in creating a comprehensive financial picture, including assets held away. We are recognized for our extraordinary service, and we are committed to enhancing our aggregation service over the long-term. In 2024, eMoney added over 300 new sources, ensuring users have access to reliable and consistent data from the connections they rely on.



### **Information Security Is Our Priority**

Fulfilling this mission requires constant attention to the security of our clients' information. eMoney has designed and implemented a robust information security program intended to ensure the confidentiality, integrity, and availability of this information. As a result, eMoney has earned top-tier security rankings within the industry. We have been SOC 2 compliant for ten consecutive years, adhere to OWASP Annotated Application Security Verification Standards, and are a member of the Financial Data Exchange (FDX). Explore an overview of the security practices and controls we use to keep data safe and secure.