

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.



109K
Financial
Professionals



6.6M
Households



2.2M
Client Sites



\$8.6T
Aggregated
Assets



40M+
Aggregated
Accounts



90%
of accounts
aggregated via
API or Direct Feed

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.