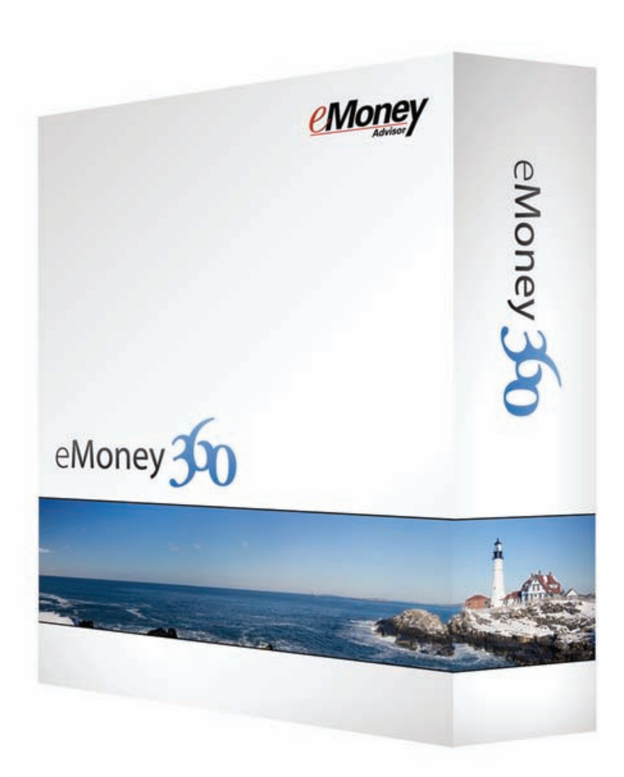
eMoney 360

Needs Analysis & Wealth Management

GROW
EDUCATE EVALUATE
COMMUNICATE **ATTRACT**
CONSOLIDATE KNOW MORE
AGGREGATE **SEE MORE**
ACCUMULATE INCREASE
ORGANIZE SELL MORE
WIN



eMoney 360 provides innovative web technology to attract new clients, increase product sales and deliver exceptional service.

Over 13 analysis templates are available to customize. Deliver your recommendations to clients in their own personal financial website, available only through you. All account balances are tracked and updated daily. See current values of all your clients' holdings, even assets held away.

Our unique online platform connects you and your client to their complete financial picture. The more you know, the better you can service…the more you can sell.

If you're looking to differentiate yourself by offering clients enhanced service through advanced technology, eMoney 360 is for you.

ATTRACT new clients

RETAIN existing clients

INCREASE product sales

SCALE your practice

GROW revenue

For more information, visit **emoneyadvisor.com** or contact us at 1-888-362-4612.

eMoney 360

1 Connect

Connect client assets, even those you don't manage, into a Personal Client Website for increased visibility and advisor/client collaboration.

2 Present

Present your analysis of the client's current situation using customized and compelling client presentations.

3 Sell

Sell product solutions to satisfy your client's identified needs and establish alerts to monitor their ongoing progress at reaching financial objectives.

Unique **Features**

- **Financial Connections** for a holistic view of all your clients' accounts updated nightly
- **Alerts and Alarms** to notify you of significant changes
- **Personal Client Website** offering 24/7 client access
- **Data Integration** fully integrated with other advisor tools
- **Needs Analysis** thirteen financial analysis modules for evaluating specific client needs
- **The Vault** for secure, on-line storage of important documents and mementos
- **Mobile Access** via iPhone, Blackberry, Android and more
- **Alliance Partnerships** for increased collaboration with attorneys, accountants, or other trusted advisors
- **TouchPoint** to convey important business and personalized messages to clients
- **Financial Concepts** to increase sales by illustrating the benefits of a variety of wealth management concepts
- **Opportunity Reports** will mine your client data for more revenue
- **Express Data Entry** for quick and accurate entry