

eMoney Fundamentals Agenda

This class will help you successfully integrate eMoney into your practice and provide you with key system knowledge and best practices. You will leave with a stronger understanding of Advisor Marketing, client communication, and how to get the most out of eMoney.

8:00 ■ **Breakfast, Introductions, Goals, and Overview**

8:15 ■ **Get Started - You Can't Stop Progress**

The Financial Truth Video - Discuss the importance of budgeting.
Clients Needs - Identify and solve your client's basic concerns.

Show me TheMoney - Learn How to Position eMoney

Marketing to Clients - Tell your story, better.

The First Meeting - Presentations designed to introduce your practice and process.

Transform Your Pitch

Build Your Pitch - What's in it for your client?

Budgets - Create a budget and stick to it.

Defy the Roadblocks - Conquer Objectives

Put Clients at Ease - Address clients concerns about privacy and security.

■ **Break**

Start Your Engines - One small step for managing client data

Add a Client - Unveiling the new client site.

Touchpoint - Custom emails targeted for specific client groups.

The Client Experience - The New Standard of Financial Services in a Digital Age

Client Connections - All their accounts in one place.

Client Budgeting - Do you know where your money is?

The Vault - Store, organize and protect your client's important stuff.

Customize Clients Experience

Your Client List - Search and group your clients.

The Client Site - You can configure the client site to meet your specifications.

Create Advisor Connections

Get Connected - Bring over your AUM.



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12:00

■ **Lunch - Let's eat!**

1:00

■ **Deepen Your Client Relationships**

Advisor Alerts - Proactively manage problems and opportunities.

Advisor Reports - Use data points to uncover additional opportunities.

Profile Grid - Uncover additional planning needs.

■ **Understand Planning Functions**

Tools Overview - Review the planning options.

Needs Analysis - Retirement and Education Analysis.

■ **Break**

■ **Review Advanced Planning Tool**

Fact Finder - Best practices to gather and enter data.

Core Cash - The basics of Cash Flow simulation.

My Info - Increase efficiency by setting your individual defaults.

■ **Next Steps - ...One Giant Leap for Your Practice**

Alliance Partners - Be the center of influence.

Scale Your Practices - Techniques for taking eMoney to market.

Integrate - Link your CRM and Investment Analysis Tools.

7 Steps - Develop your Game Plan and a Call to Action.

4:00

■ **Questions and Answers / Wrap Up**

