



Marketing Specialist License Fact Sheet

Overview

More advisors and firms are moving to a team-based model where each team member has unique responsibilities. In this model, it is common for there to be a dedicated marketing professional who handles marketing on behalf of the firm and/or the advisors of the team. Because of this, one of the most frequent requests we receive is for a license option which allows the dedicated marketing professional to access the Bamboo marketing tool without visibility of clients' financial details that are found in the eMoney platform.

To support this growing need, we are adding a new license option for Bamboo—the Marketing Specialist.



What is the Marketing Specialist license?

The Marketing Specialist license provides access to Bamboo without visibility of clients' financial data that is also found in the eMoney platform. A user setup with a Marketing Specialist license:

- Has complete access to the Bamboo marketing tool
- Can manage marketing on behalf of Advisors who are licensed with Bamboo
- Does not have access to any other areas of the eMoney platform such as planning tools, integrations, analytics, client portals, connections, alerts, tasks, or client data.

What is the price of the Marketing Specialist license?

The price of the Marketing Specialist license is \$1100 per user per year—similar to the Support license.

Note: An Advisor Bamboo license is still required in addition to the Marketing Specialist license.

Who can purchase?

The Marketing Specialist license can be purchased for those on EMA.

Where should inquiries be directed for purchasing a Marketing Specialist license?

Inquiries for purchasing a Marketing Specialist license should be directed to the Sales email or phone queue.

Marketing Specialist License Fact Sheet (cont.)

How is the Marketing Specialist license different than the Support license?

The Support license remains unchanged—providing access to the eMoney platform and planning tools. The Marketing Specialist license has access to only the Bamboo product—no access to client financial data, planning tools, or the client portal.

What does the Marketing Specialist license see upon login to Bamboo?

Upon login the Marketing Specialist will see the Bamboo dashboard.

The Marketing Specialist license will **not** have the same navigation bar options that are visible for eMoney platform Advisor and Support licenses.

