



*e*Money

Town Hall

July 28, 2022

Agenda

1. Welcome
2. Q2 Business Update
3. Summit at-a-Glance
4. Employee Engagement Survey Update
5. Head of Product Introduction
6. Two Truths & a Lie: CLT Edition
7. Q&A



100,000 USERS

NY Life added **575 licenses** – pushed us over the 100K threshold in May 2022.

Every benefits-eligible employee will receive 100 eMpower points today.

Q2 Business Update



Morgan Jones
SVP, Sales

Q2 YTD 2022 Business Update

ADVISOR SALES

ARR (\$M)	\$9.2M
% to Goal	109%
Wins	3,208
Avg. Selling Price	\$2,609*

* Excludes Rockefeller

ENTERPRISE RESULTS (ARR)

ARR Goal	\$1,433K
ENT Deals	\$1,822K
Incentive Deals	\$ 74K
HOP Deals	\$ 60K
Actual ARR TOTAL	\$1,956K
% to Goal	137%

Q2 2022 HIGHLIGHTS

Enterprise

- NY Life – B/D side \$620k
- First Clearing - \$200k
- Closed Q2 at 140% YTD Budget

Advisor Sales

- Closed quarter at 107% YTD Budget
- 30 deals at \$10k+
- Up 12% on YoY Sales

HOME OFFICE PACKAGE WINS

CI Private Wealth
Trilogy Financial Services
NFP Retirement
Wealth Dimensions
Merit Financial Advisors
Assured Partners

INCENTIVE WINS

The Dayton Company
StatonWalsh
Caprock Wealth Advisors
Fort Washington Financial & Insurance Services
VisionPoint Advisory Group
Pensionmark (Whitelabel)
Intellicents (Whitelabel)
Moxie Holdings
TPA Financial

STRATEGIC WINS

WSFS
Advisor Group
Principal Securities
Rockefeller
Sageview Advisory Group
Henssler Financial
NYLife
Wells Fargo First Clearing

Financial Update



Eric Kerble
VP, Financial Planning & Analysis

Annual Recurring Revenue

	2022 YTD Results	2022 FY Budget
eMoney		
Planning	\$10.6M	\$20.5M
Incentive	\$0.1M	\$1.2M
Churn	(\$5.2M)	(\$13.7M)
Net New ARR	\$5.4M	\$8.0M
Net New Fidelity Full-view	(\$2.1M)	(\$2.1M)
Net New ARR Total	\$3.3M	\$5.9M

Financial Results

	2022 YTD Results	FY Budget
Revenue	\$68.8M	\$134.5M
Expense	\$75.6M	\$158.5M
Earnings	(\$6.8M)	(\$24M)

SUMMIT AT-A-GLANCE



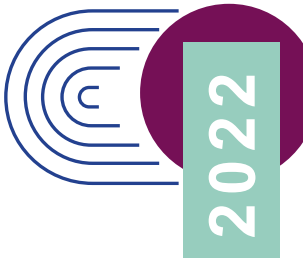
Brynn de Garavilla
Director, Retention Marketing

BRIDGING THE GAP

As the pace of change continues to accelerate across all aspects of our lives, financial professionals face increasing pressure to meet the diverse needs and expectations of their clients.

Advisors who are able to bridge the gap between their expertise and the needs of their clients through a focus on personalized experiences, service offerings, technology usage, and business models will be able to confidently move their business forward regardless of what comes next.

2022 Summit Refresher



Overview

When: October 17 – 19

Where: Virtual event

What: User conference

Why People Attend

CE Credits
(Earn 11+ credits)

eMoney Training

Proprietary Research

**Product Roadmap &
Vision**

Keynote Speakers

Pricing

Mid-Summer Pricing
through **August 31**: \$450

Full Price in effect
September 1: \$500

**Discount codes may be
appropriate (i.e. new users,
enterprise users, etc.)*

2022 Key Highlights

• Registrations

- **2021:** 355
- **2022: 670***
**Includes firm registrations not yet fulfilled*

300+ registrants ahead of last year!

• Keynote speakers

- Carla Harris
- Andrew Busch

• Summit Resources

- [Summit Site](#)
- [Life@eMoney Page](#)



The screenshot shows the official website for the eMoney Summit 2022. The header includes the 'life@eMoney' logo and navigation links for 'About eMoney', 'Business Units', 'News, Events & Features', and 'Manager Resources'. Below the header, the main title 'eMoney Summit 2022 • OCTOBER 17-19' is prominently displayed. The page is divided into several sections: '2022 SUMMIT OVERVIEW + GOALS' which lists dates (Monday, October 17 – Wednesday, October 19, 2022), location (Virtual), and attendee benefits (technology adoption, learning from industry leaders, building knowledge with eMoney training, continuing education, and product insights); 'THEME' section titled 'Bridging the Gap' with a description of the current financial landscape; 'QUICK LINKS' providing direct URLs for the summit site, pricing, agenda, FAQs, sponsor inquiries, and a registration link; and a 'HELP US PROMOTE' section with an email signature. The footer contains the eMoney Summit logo, a 'LEARN MORE' button, and contact information including a full name, phone number, email, and website.

life@eMoney

About eMoney | Business Units | News, Events & Features | Manager Resources

About eMoney / 2022 eMoney Summit: Bridging the Gap

eMoney Summit

2022 • OCTOBER 17-19

2022 SUMMIT OVERVIEW + GOALS

- **Dates:** Monday, October 17 – Wednesday, October 19, 2022
- **Location:** Virtual
- **Summit attendee benefits:**
 - Technology adoption, training, practice management, higher platform usage, and engagement
 - Learn from industry thought leaders and inspiring keynote speakers
 - Build on your knowledge with extensive eMoney training opportunities for every level of experience
 - Tons of continuing education opportunities
 - Insights into product roadmap and vision

THEME

Bridging the Gap

As the pace of change continues to accelerate across all aspects of our lives, financial professionals face increasing pressure to meet the diverse needs and expectations of their clients.

Advisors who are able to bridge the gap between their expertise and the needs of their clients through a focus on personalized experiences, service offerings, technology usage, and business models will be able to confidently move their business forward regardless of what comes next.

QUICK LINKS

- **2022 eMoney Summit:** <https://emoneyadvisor.com/summit2022/>
- **Pricing:** <https://emoneyadvisor.com/summit2022/pricing/>
- **Agenda:** <https://emoneyadvisor.com/summit2022/agenda/>
- **FAQs:** <https://emoneyadvisor.com/summit2022/faq/>
- **Sponsor:** Please direct sponsorship inquiries and questions to advisorsummit@emoneyadvisor.com.
- **Registration Link:** https://cvent.me/anrkxE?_ga=2.62892591.2060877660.1656332590-623192208.1646149316

HELP US PROMOTE

Email Signature

eMoney Summit
2022 • BRIDGING THE GAP
[LEARN MORE](#)

Full Name
Life
T: 555.555.5555 x 300 M: 555.555.5555
E: name@emoneyadvisor.com W: emoneyadvisor.com



Employee Engagement Survey Progress



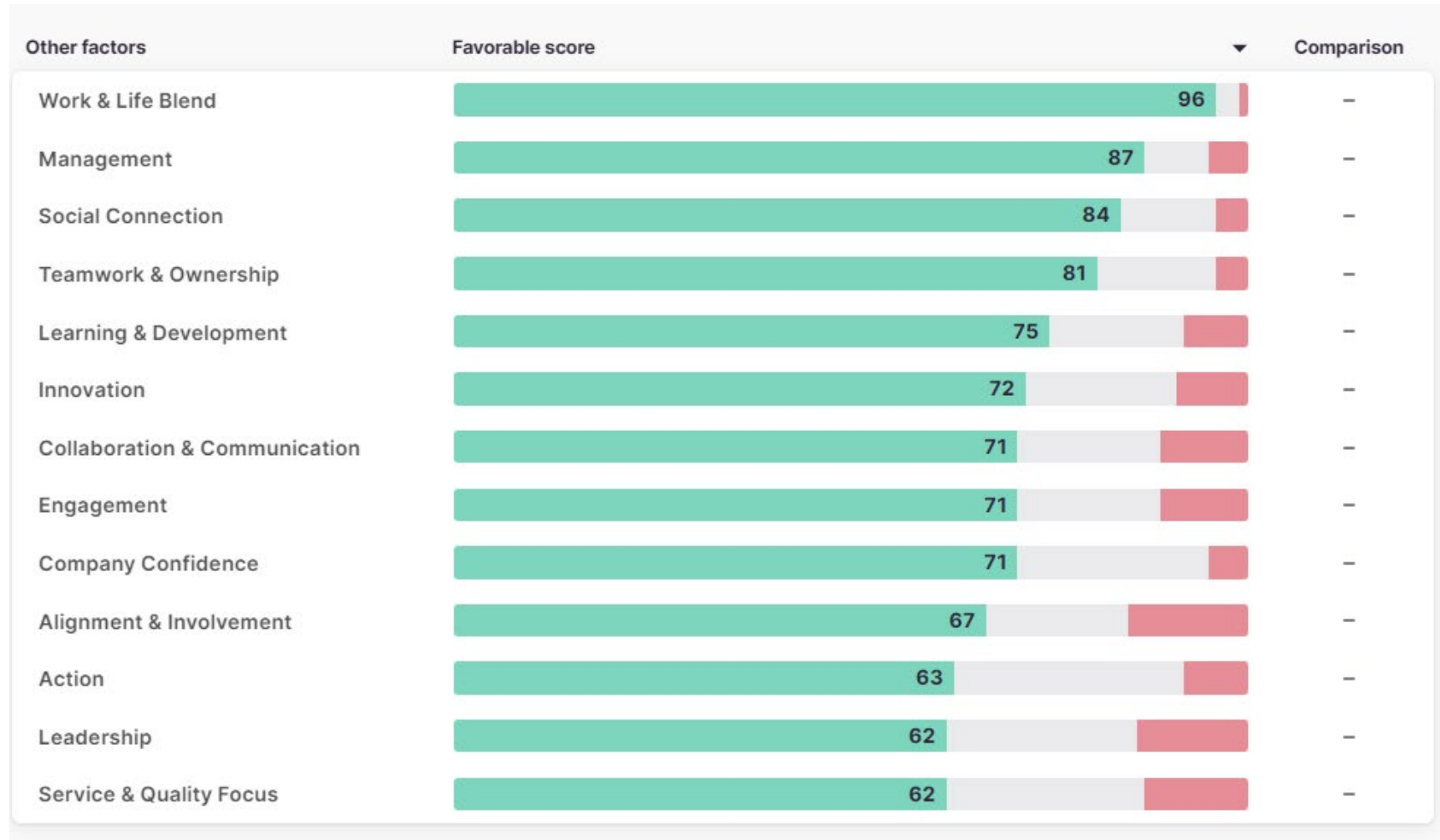
Pam Henry

Director, Employee Success & Development

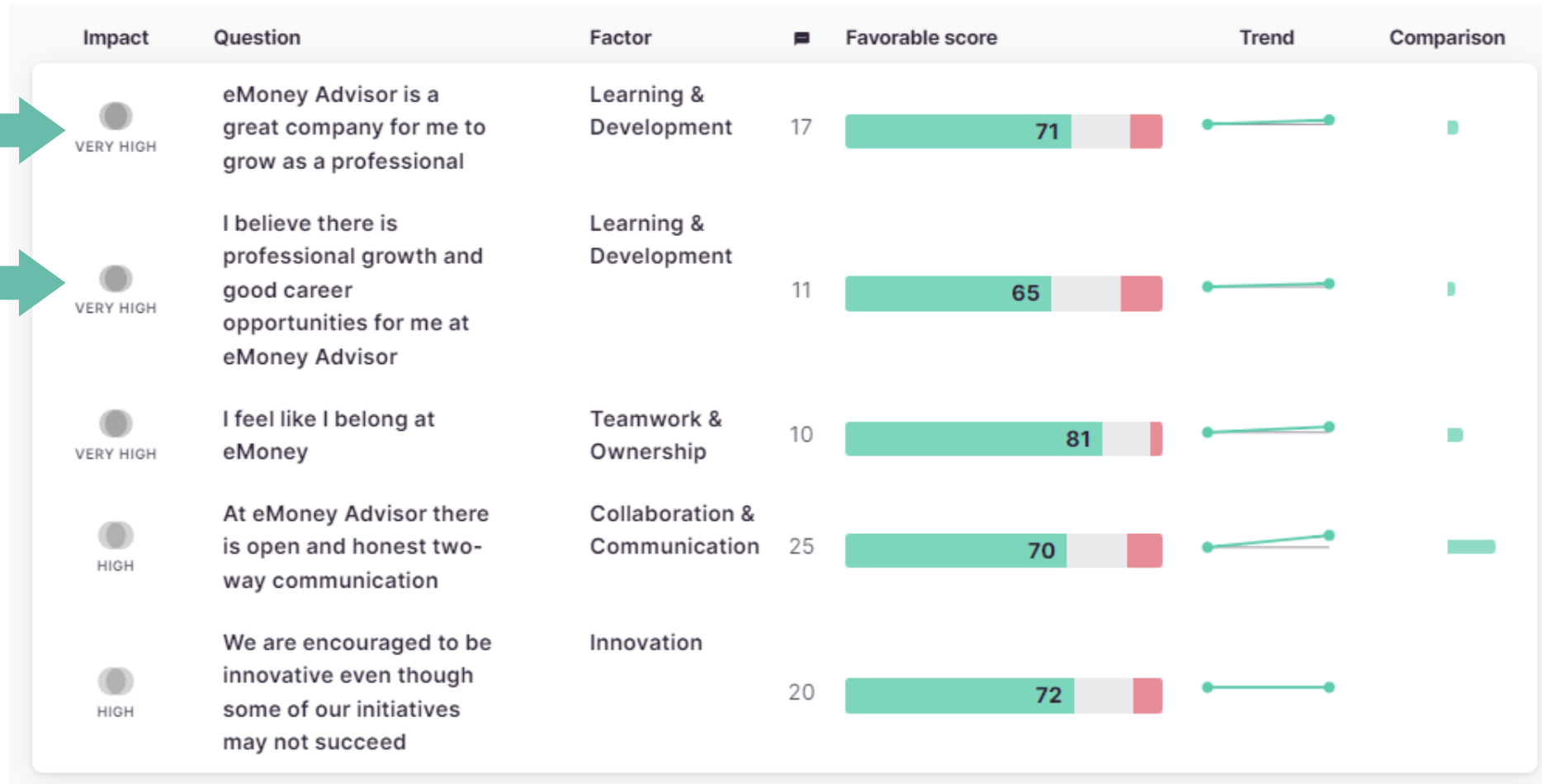
eMoney's 2021 Pulse Survey Results

2021 Survey
60 Questions

2022 Pulse Survey
23 Questions



Top 5 Questions Impacting Engagement



Employee Engagement Survey Progress

Employee Development and Growth

Q1 - New Year, New You

- Reacquaint yourself with DevelopMe; Talent Sort Interest Assessment, Value Smart Assessment

February

- Manager Career Workshop
- Employee Career Workshop

March

- Lunch & Learn: Making Internal Career Moves

Q2 - Spring into Action

- Take action in DevelopMe - Options Smart Assessment, Reputation Builder Planner, Network Smart Planner

May

- Expanded Learning Catalog

June

- Growth Week
- Fireside Chat
- Career Development Learning Journeys
- **Career Development Corner (Life@eMoney)**

Q3 – Soak up the Sun and Career Development

July

- New Competency Framework and development planning

Still to Come in Q3

- Build Your Support Planner, LifeMastery Builder Assessment and Aligning your Aspirations Worksheet.
- **Reengineer Your Personal Brand Webinar**
Hosted by LHH

Virtual Instructor-Led Training

Completed Sessions

Session Name
Leading Meetings: Use Time Effectively
Strategic Career Management Workshops
Leading Self: Turn Self Awareness into Impact
The Art of Behavioral Interviewing
Communicating With Impact
Leading with Purpose (4-part Series)
Managing Inclusion
Presentations That Make an Impact
CliftonStrengths Team Sessions
New Competency Framework Trainings

728
Attendees

Upcoming Sessions

Title	Date
The Art of Behavioral Interviewing	Sept. 1, Nov. 30
Addressing Performance Challenges	Sept. 6, Nov. 17
Presentations That Make an Impact	9/13/2022
Managing Inclusion	9/27/2022
Leading with Purpose (4-part series)	Sept. 29, Oct. 6, Oct. 27 & Nov. 1
Leading Meetings: Use Time Effectively	10/12/2022
Leading Self: Turn Self Awareness into Impact	11/15/2022



Online Courses

PX Online Courses

California Employee COVID Training
Communication: Connect Through Conversations
eMoney Application Overview
eMoney Orientation Review Game
Employee Compensation Training 101
Harassment Prevention: A Commonsense Approach
Leading Virtual Meetings
New Hire Benefits Orientation
Performance Goals In DIG
Stand and Huddle: Short Meetings that Address Team Challenges
Timecard Completion in ADP
What is eMoney?
Your Leadership Journey

722
Completions

Top Ten SkillSoft Courses

Workplace Diversity, Equity, and Inclusion in Action
Moving from Bias to Inclusion in a DEI Journey
New Project Manager Essentials
Using the Parts of Speech
A Talk With The Next Generation Of Leaders
Becoming an Accountable Professional
Defining a Project Scope and Team
Developing a Growth Mindset
Programming Structure, Methods, & Variables
The Power of Insight: How Self-Awareness Helps Us Succeed at Work and in Life
Your Role in Workplace Diversity
Workplace Diversity, Equity, and Inclusion in Action

104
Completions

Blue Ocean Brain – Micro Content

107 Unique Engaged Learners for July

Most Engaged Learners

1. Stephen Marzeotti	6. Courtney Frazier
2. Michael Fitzgerald	7. Dan Mer
3. Allen Shaver	8. Rhonda Bastarache
4. Brad Pritchard	9. Ellen Blondo
5. Richard Hoffman	10. Viola Peja

Most Engaging Topics

CREATIVITY AND INNOVATION
PERSONAL GROWTH LEADERSHIP
HANDLING CHANGE PRODUCTIVITY
INCLUSION AND DIVERSITY
COMMUNICATION
CRITICAL THINKING DIGITAL STRENGTH
EMOTIONAL INTELLIGENCE
COACHING AND FEEDBACK

Employee Excellence Award Winners

Individuals	Individuals	Teams	Teams	Teams
- Veronica Bergey - James Berridge - Camille Cortina - Brynn de Garavilla - Anthony Grimaldi - Paul Guris - Wesley Hansen - Samantha Hoch - Wan Huang - Matt Hursh	- Brooke Hyland - Chazzme Jones - Tricia McFarlane - Taylor Piwonski - Julie Salvatore - Brandie Shaffchick - Alix-Camille Stephenson - Jillian Suave - Cara Woodland	Client Support Leadership Team - Tarnisha Bruce - Eric Carroll - Michael Clark - Steven Sharp - David Newhard - Amy Makdisi - Dan Mer	Corporate Comms Team - Joanna Armandi - Elizabeth Mazanek - Grayce Turnbach Employee Success Team - Elizabeth Jude - Doug Cooper - Dave Ferrier	FPG: Education Team - Sasha Grabenstetter - Kerry Gaitley - Emily Koochel - Arleney Abad FPG: Practice Management Team - Connor Sung - Brandon Heid - Chris Mauriello - Joe Buhrmann
Teams	Teams	Teams	Teams	
FPG: Service and Research Team - Lindsay Robinson - Patrick Matlick - Michelle Riiska - Madeline McAleer	Financial Simulation Team - Sean Bluestein - Kathleen Corlew - Chris Ryan - Dan Donahue - Dave Malloy - Joel Ugwuebulem - Wen Ching Li - Jack Wu	LBS Team - Jon Long - Elizabeth Wacker - Daniel Shields - Ricky Hoffman - Jason Jones - Kyle Lundy - Stephen Chang - Isaac Adams - Kristin Curry	LBS Team (Cont'd) - Matthew Wayock - Dennis Smith - Keenan Lentz - Samantha Hoch	

Head of Product



Tom Sullivan
Head of Product



Two Truths & a Lie



Frank Tropiano
Head of Client Services

Frank Tropiano

- I came in 3rd place in a Mathlete's competition
- I went swimming with sharks and got bitten by a stingray
- I love to swim



Susan McKenna
Interim CEO
Head of Marketing and Sales

Susan McKenna

- I wrote trivia for computer games
- I climbed the highest mountain in Scotland
- I used to do impressions for a Philadelphia Radio Station



Matt Schulte
Head of Financial Planning

Matt Schulte

- I went swimming with sharks
- I suffer from a fear of heights (acrophobia)
- Me and my wife fostered a pig for a month

Jason Reiser



Jason Reiser
Head of Legal and Risk

- I've seen a penguin and a puma in the wild in the same week
- I have a sailboat named after me
- I've performed on stage multiple times with an actor who was one of the main characters in Game of Thrones

Joanne Del Signore



Joanne Del Signore
Head of People Experience

- I met my husband at my cousin's wedding
- I was an extra in the movie Snake Eyes with Nicholas Cage
- I am one of 7 siblings

Tom Sullivan

- Lives in NJ
- Is a hugger
- Came out of retirement to work at eMoney



Tom Sullivan
Head of Product

Megan Murray



Megan Murray
Head of Finance

- I have 4 children
- My first job out of school was working for a Podiatrist
- I drove cross country in 3 days

Nick DiLisi



Nick DiLisi
Head of Technology

- I have a food allergy. I'm allergic to small portions.
- I have been told I have the patience of Job but don't think I'm a patience person at all. I think it is more about the suffering part of the story.
- All of my family members filed for dual citizenship except for me to buy a \$1 home in Siena, Italy.



Q&A