eMoney

Welcome! We’ll start soon.

Town Hall

May 4, 2023

May 2023 Town Hall
Agenda

1. Business Update
2. Employee Engagement Survey
3. DEI Update
4. Product Strategy & Competitive Landscape
5. Technology Strategy
6. Office Update & Upcoming Events
7. Q&A with CLT
8. Feedback Survey

Welcome

Susan McKenna
CEO

FINTECH BREAKTHROUGH AWARD 2023

2023	**Best Overall Fintech Company** *Seventh Consecutive Year Being Recognized by Fintech Breakthrough!*
2022	Best Wealth Management Company
2021 & 2020	Best Wealth Management Product
2019 & 2018	Best Overall Fintech Software
2017	Best Wealth Management Platform

Business Update

Eric Kerble
VP, Financial Planning & Analysis

Morgan Jones
SVP, Sales

Q1 2023 Business Development Update

ADVISOR SALES	
Wins	1,525
Avg. Selling Price	$2,812
ARR ($M)	**$4.29m**
% to Goal	**100%**

ENTERPRISE RESULTS (ARR)	
ENT Deals	27
ARR ($M)	**$.559**
% to Goal	**72%**

Q1 STRATEGIC ENTERPRISE WINS
Principal Life Insurance Company (240k)
Mariner Wealth Advisors (68k)
First Republic Bank ($67k)

Q1 STRATEGIC ADVISOR WINS
Cerity Partners (130k)
City National Rochdale (34k)
MAI Capital Management (27k)
True North Advisors (22k)
Csenge Advisory Group (13k)
Capital Wealth Management (11k)

Q1 2023 SDR HIGHLIGHTS

Enterprise:

- 6 meetings booked and 313k added to the pipeline

Advisor Sales:

- 6,056 leads created - 161% to target
- 1,330 meetings booked – 113% to target
- $1.53m in closed revenue

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Annual Recurring Revenue

(m's)	YTD Results	YTD Budget	2023 FY Budget
eMoney			
New ARR	$5.2M	$5.3M	$23.1M
Churn	($6.5M)	($5.6M)	($15.5M)
Net New ARR	**($1.3M)**	**($0.3M)**	**$7.6M**
Net New Fidelity FullView	$5.0M	$5.0M	$5.0M
Net New ARR Total	**$3.7M**	**$4.7M**	**$12.6M**

Financial Results

	2023 YTD Results	2023 YTD Budget	FY Budget
Revenue	$35.8M	$36.6M	$151.9M
Expense	($38.3M)	($40.4M)	($157.0M)
Earnings	**($2.5M)**	**($3.8M)**	**($5.1M)**

2023 Employee Engagement Survey

Pam Henry
Director, Employee Success & Development

Building a Better Workplace Together: Employee Engagement Survey

- **Monday, May 8: Survey Opens**
  - Invitation email sent to employees via Culture Amp with private survey link. Don't share with anyone!
- **Friday, May 19: Survey Close**
  - **Goal:** Reach **85% participation** – 50 eMpower points to every employee!
- **Communication Schedule**
  - **Leadership Team email:** Sent yesterday, May 3
  - **Culture Amp email**: May 8
  - Reminder emails from Culture Amp for those that did not complete. ☺

Progress Since 2021 Survey Results

- Created more awareness around the learning opportunities available to you through **DIG (Skillsoft)**, the **external training budget**, and **instructor-led courses**. We even hosted our first-ever **Growth Week** – which returns this June!
- Identified new ways to connect through **virtual events** like cookies and cocktails, paint night, and Jesse Israel. **Sign up for the next cooking experience by May 12 on the life@eMoney Intranet > Company News**.
- Improve transparency and open communication with **Peer-to-Peer Coffee Talk** and **CLT Office Hours**. **Sign up for the next CLT Office Hours on the life@eMoney Intranet > About eMoney > CLT Office Hours.**
- **Each business unit made specific changes** to drive engagement and connection within their respective areas and address areas that needed improvement based on the business unit results.

2023 Survey Results & Action Planning

Date	Milestone
May 11	Manager meeting to explain how to review engagement survey results and action planning
June 1	Review Culture Amp results with CLT
June 1	Share manager reports
July 31	Submit action plans in Culture Amp

Keep in Mind...

For the "**Leaders**" section, please think of these questions in relation to the **Core Leadership Team (CLT)**

For the **"Manager"** section, please think about the questions as they relate to your **direct manager.**

DEI Update

Surabhi Vibhuti
DEILC Co-Chair
Director, Development

2022 Highlights

- DEI Subcommittees Mobilized
  - Employee Engagement
  - Communication
  - Learning
  - Talent Strategy/Recruitment
- DEI Insight with Wendy John
- Why Pronouns Matter
- Employee Heritage Spotlights
- DEI Movie Club

- Monthly DEI Event Awareness
- Black History Month Reflections
- Women's History Month Spotlights
- DEI Manager Trainings
- Targeted Recruitment Efforts
- Unconscious Bias Discussions
- DEI included in Onboarding

2022 DEILC Scorecard

DEILC

Employee Engagement (Participation)

166 - Employee DEI Orientations
32 - DEI Movie Club Participants
3 – Movies Watched/Discussed

Communication (Intranet Engagement)

Average 100 views per article
Total 2109 views to Posts
21 – Total Articles Posted
14% of Intranet Content DEI Related

Talent/Recruiting

(Targeted Focus)
44% Diverse External Hires
65% Diversity in People Leader Hires
Hires in 10 different states
D&I Glassdoor Rating – **4.4**

Learning (Participation)

6 - DEI Manager Training Sessions
100% Completion Rate
Prep for Individual Contributor DEI Training

2023 Areas of Focus

1

Employee Engagement

- DEI Movie Club Continued
- DEI Employee Luncheons
- More Employee Forums
- Diversity Event

3

Learning

- Employee DEI Training
- Korn Ferry Training Review
- Expand Leadership Knowledge

2

Communication

- Life@eMoney
- More DEI Communication Channels
- More Employee Spotlights

4

Talent Strategy & Recruitment

- Regular check-ins with employees
- 50% of Diverse External Hires

Existing DEILC Members

Megan Murray
Head of Finance

Joanne Del Signore
Head of People Experience

Jason Reiser
Head of Legal and Risk

Tarnisha Bruce (Chair)
Client Services

Surabhi Vibhuti
(Co-Chair)
Technology

Eric Kerble
Finance

Pam Henry
People Experience

Wayne Heilala
Product

Joanna Armandi
Marketing

Chuan Au
Technology

Adam Buchanan
Legal and Risk

Welcome to the New DEILC Members!

Lana Belyanska
Technology

Samantha Bewley
Technology

Daila Bouffard
Client Services

Susana Shukhman
Legal and Risk

Eric Carroll
Client Services

Mike Harris
Technology

Alex Rivera
Client Services

Connor Sung
Financial Planning

Business Highlights:

What traction are we seeing against strategic priorities?

Product Strategy:

Client Feedback, Roadmap, and Aggregation Progress

Ricky Illigasch
VP, Product Development

Our Mission

Helping people talk about money.

Our Vision

Financial peace of mind for all.

We Believe…

Financial Plans are foundational to building and growing relationships.

Advisors are essential.

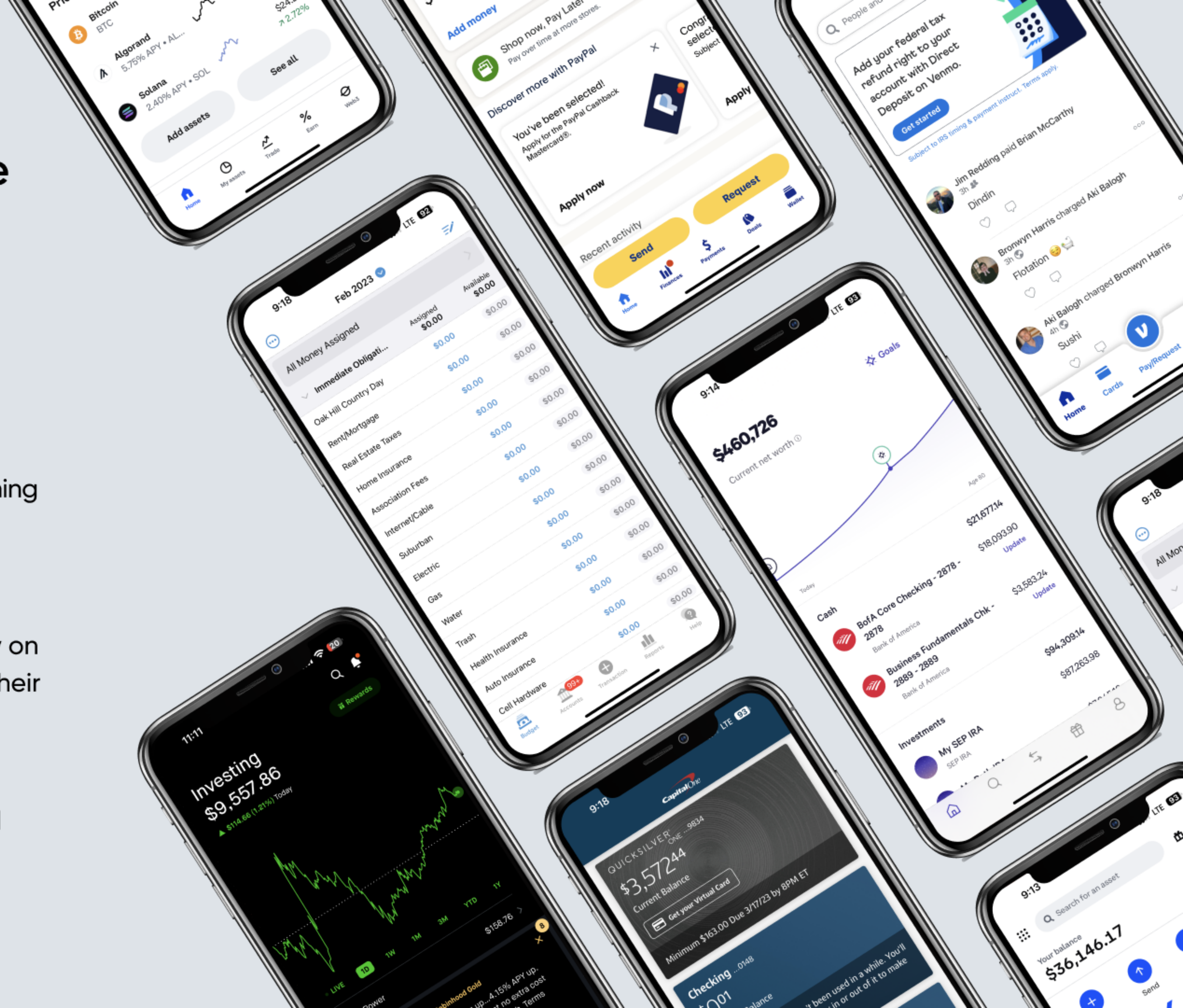
Empower advisors with the right tools, so they can focus on building relationships.

Consumers want and expect companies to use technology to tailor and shape their customer experiences.

42% of firms shared the number 1 thing they've invested the most in is digital marketing

53% of people would prefer to rely on one single firm to service all their financial needs

65% of advisors believe the digital client experience is critical



[1,3] 2022 InvestmentNews Adviser Technology Study
[2] Cerulli Reports US Retail Investor Products and Platforms 2021

Unlock the power of eMoney

Planning - Strategic Roadmap

Focus: Data Gathering | Planning | Presentation

GOALS & OUTCOMES	COMING SOON Launched or in the next 6 months		IN THE WORKS Launching in 6–9 months		FUTURE Future direction themes
Data Gathering ▪ Reduce time-to-gather data ▪ Ensure greater data accuracy	Fact Model Architecture Analysis	☑	Architecture Analysis	☑	Automated Data Gathering ★
	OCR Architecture Vendor Analysis		Architecture integration of POC's	☑	Custom Data Gathering Templates ★
					Fact Finder Experience Design ★
Planning ▪ Eliminate workflow breaks + unsupported functionality, reducing time-to-plan ▪ Reduce manual work needed, reducing time-to-plan ▪ Eliminate subject matter expertise as barrier-to-plan	SECURE ACT 2.0 Updates	☑	Multi-View: Compare Across Plans		DC as Intelligent Partner to Users ★
	TOD on Taxable Accounts	☑	SIMPLE IRA Support		Top 80% Reports Usage in DC ★
	More Modernized/ADA Reports	☑	Improved DC Layout / Usability		Full Facts / AP Toll Access in DC ★
	Multi-View Dashboards in DC – 23.3	☑ (orange)	Savings MC Solver in DC		GP Access in DC + Enhancements
	Insurance MC Solver in DC	☑	Savings MC Solver (Select Accts)		Portfolio Analytics in DC
	More Top Reports Added to DC	☑	More Top Reports Added to DC		Products Marketplace in DC
	Progress to Goals (Basic Chart) – Work in 23.1, releasing 23.2 (3/28/23)	☑			Top Planning Debt / UV Addressed
					Ins. Agent Experience (Research)
Presentation Building ▪ Reduce time-to-create pres. ▪ Enhance customization ability	Customizable Plan Summary	☑	Cust. Plan Sum. (Add'l Enhanc.)		Enhanced Pres. Customization ★
			Unified Presentation Experience ★		

☑ (green) Projects that are on track, complete and/or scheduled to complete before 23.3

☑ (orange) Projects that may have slipped slightly, are dependent on an outside party, or will get done in 23.3

☒ Projects that have significant work in 23.2 but will stretch beyond 23.3

★ Supported by new architecture patterns

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Aggregation Externalization Strategic Roadmap

Focus: Data Gathering | Scale Nexus | Ease of Use & Integration

GOALS & OUTCOMES	COMING SOON Launched or in the next 6 months	IN THE WORKS Launching in 6-9 months	FUTURE Future direction themes
Ease of Use & Integration • Reduce time & effort to integrate • Smarter workflows will reduce Friction and increase customer Engagement • Monetize and externalize Agg Components & Agg APIs	Connection Management UI Component ✓ Agg API 1.0 Connections ✓	Institution Search Uplift Connection Support Manager UI Component Connection Alerts & Notifications UI Component Agg API 1.0 Accounts Aggregation: Enable Chat	EMA Advisor Site Component Transition EMA Client site Component Transition Agg API 1.0 Transactions Transaction Categorization
Scale Nexus ▪ Support projected growth of accounts gathered ▪ Break Nexus into autonomous pieces that can scale elastically. ▪ Reduce development and deployment dependencies across teams. ▪ Improve system fault tolerance ▪ Take advantage of modern Cloud technology	Performance Test Strategy ✓ (orange) Cloud Readiness ✓	Containerize Nexus Cloud Readiness	Containerize Nexus

✓ (green) Projects that are on track, or complete, and/or scheduled to complete before 23.3

✓ (orange) Projects that may have slipped slightly, are dependent on an outside party, or will get done in 23.3

☒ Projects that have significant work in 23.2 but will stretch beyond 23.3

Aggregation Data Gathering Strategic Roadmap

Focus: Data Gathering | Scale Nexus | Ease of Use & Integration

GOALS & OUTCOMES	COMING SOON Launched or in the next 6 months	IN THE WORKS Launching in 6–9 months	FUTURE Future direction themes
Data Gathering	Fidelity – Parser to API ☑	TD/Schwab Migration –BFF	Modernize Transaction Categorization
	NFS File Optimization ☑	Amex – Parser	Enhanced Aggregation Metrics
	Loan Depot – Parser ☑	Navy Federal – API	Income & Taxes
	TD Bank – Parser to Akoya ☑	Discover – API	Robinhood – API
	TIAA – Parser to API ☑	US Bank – Via Akoya	Chime - API
	Bank of Montreal – Parser ☑	PNC – Via Akoya	Amex – Parser to API
	Citizen Access – Parser ☑	AFCU – Via MX	Voya - API
	Nationwide Annuity – BFF ☑	Prevent Duplicate Transaction IDs- Parser	Jack Henry – Via Akoya
	Reliance Advisor - BFF ☑	GS Folio - BFF	Computershare - BFF
	Max Interest – BFF ☑ (orange)	GS Select - BFF	StoneCastle - BFF
	Altruist – BFF ☑ (orange)	BNYM Mass Mutual - BFF	Pentagon Federal CU - API
	Betterment – BFF ☑ (orange)	BNYM - BFF	Apple Cards - API
Scale Nexus	Message Based Refresh ☑	Message Based Refresh	
	Cloud Readiness ☑	Cloud Readiness	
	Cloud Solution ☑	Evaluate BFF Cloud POC	
	Reduce Bulk File Processing on Nexus ☑	Reduce Bulk File Processing on Nexus	

Data Gathering

- Comprehensive data gathering through by increasing the:
  - availability and consistency of connections
  - breadth and depth of data collected.
- Stable and consistent access to aggregated data by increasing
  - Direct feed via API and BFF
- Streamlines processes to add institutions by:
  - Improving processes to onboard new institutions
  - Strategic partnerships
- Visibility and understanding of aggregated data with:
  - Better metrics

Scale Nexus

- Support projected growth of accounts gathered
- Break Nexus into autonomous pieces that can scale elastically.
- Reduce development and deployment dependencies across teams.
- Improve system fault tolerance
- Take advantage of modern Cloud technology

☑ (green) Projects that are on track, or complete and/or scheduled to complete before 23.3

☑ (orange) Projects that may have slipped slightly, are dependent on an outside party, or will get done in 23.3

☒ Projects that have significant work in 23.2 but will stretch beyond 23.3

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Integrations and Strategic Partnerships

Focus: API/PRT | Integrations/PRT | PSG/FPRT

GOALS & OUTCOMES	COMING SOON Launched or in the next 6 Months	IN THE WORKS Launching in 6-9 months	FUTURE Future direction themes
APIs ▪ Sell new API Products, Basic & Premium to Enterprise Sales ▪ Work towards enabling Third Parties to connect to our APIs via OAuth ▪ Provide new functionality and updates in v2 of our APIs ▪ Increase value of APIs products with projection and computed calls ▪ Improve Developer Experience ▪ Modernization Support ▪ Continue to build out Fact APIs ▪ Understand our users via improved reporting and monitoring ▪ Prepare for Components and Services	Create Basic & Premium Products ☑ Real Estate, Annuity, HSA ☑ Active Plan, PATCH, Personal Property ☑ Trusts, Life Ins. Sched, Business Disability ☑ Networth, MC Summary and Cashflow ☑ Asset Holdings ,Linear Cashflow ☑ OAuth Advisor Flow ☑ API V2 Migration ☑ Ongoing Developer Site Updates ☑	Apigee OnPrem Review for Cloud Services support Taxes, Holding Details PATCH to support DC fact editing Vault API Enhancements (CWN) Entitlements Drupal 10 Upgrade - Prep Business Intelligence	Stock Options Savings & Transfers Monte Carlo Longevity Risk Balance Sheet APIs Networth History Drupal 10 Upgrade - Implement Update exiting Facts APIs w/ new functionality GraphQL
Integrations • Reduce time to go from plan to action	Envestnet Proposal Generation Prefill ☑	TD/Schwab Merger Tamarac Docs in the Vault	3rd Party API Offering FidX Integration

☑ Projects that are on track, complete and/or scheduled to complete before 23.3

☑ Projects that will be completed in 23.3

☒ Projects that have moved beyond 23.3

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Platform Roadmap

GOALS & OUTCOMES	COMING SOON Launched or the next 6 months		IN THE WORKS Launching in 6–9 months	FUTURE Future direction themes
Modernization ▪ Data Lake ▪ Vault to Cloud FileSystem ▪ Config for Planning Modernization	Analytics ETL to Data Lake	☑	Vault DB to S3 FileSystem	Config Modernization – SDK, etc.
	Apigee Gateway On-Prem for Cloud (Repeat from APIs!)	☑	Config Modernization - *Facade*	
Platform Core ▪ Enable large population deployments ▪ Scale & Extend Sharing Rules ▪ Ease of Use / VOC ▪ Tech Currency	Sharing Rules Performance Uplift	☑	Share Client Group to Accessor(s)	
	Vault Bulk Actions – Move Files	☑	Migrating Client Connections on Ownership Transfer (VOC)	
	Analytics .Net Upgrade	☑		
emX Authentication (Okta) ▪ Eliminate Homegrown Auth system ▪ Leverage Okta's Modern Auth UX	Split emX Username & Pwd Pages	☑	Password Policy Mgmt in Okta	Multi-Factor Auth via Okta
	Login via embedded Okta Widget	☑	Self-Service Recovery via Okta	
	Okta User Profile – Contact Info	☒	Inbound SSO via Okta	

☑ (green) Projects that are on track, complete and/or scheduled to complete before 23.3

☑ (orange) Projects that will be completed in 23.3

☒ Projects that have moved beyond 23.3

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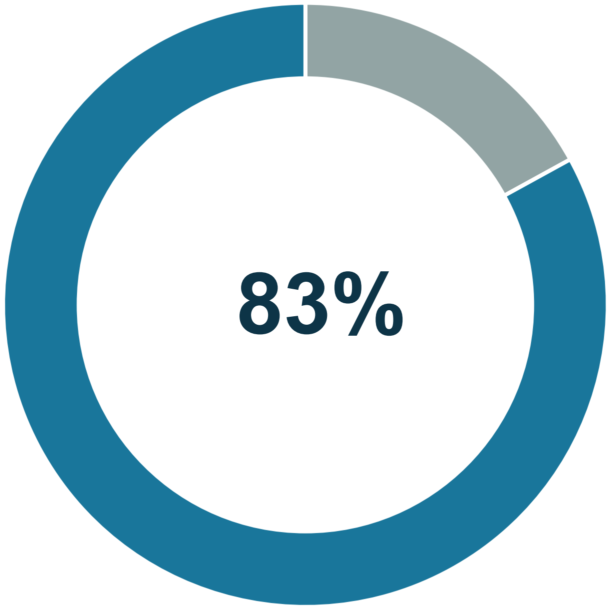
Continued Success with Data Aggregation

Reduction of open tickets over 2.5 Years



Issue Reporting & Resolution

- 83% reduction of open tickets in the last 2.5 years (from 1087 to 122)
- 36% reduction in annual related support calls (129k to 83k since 2019)
- 50% reduction of time to resolve issues: from 30-40 days for open tickets to 14 days, over the last year

Scale & Efficiency

- 70% increase in accounts aggregated since 2019 – over 30.5M accounts

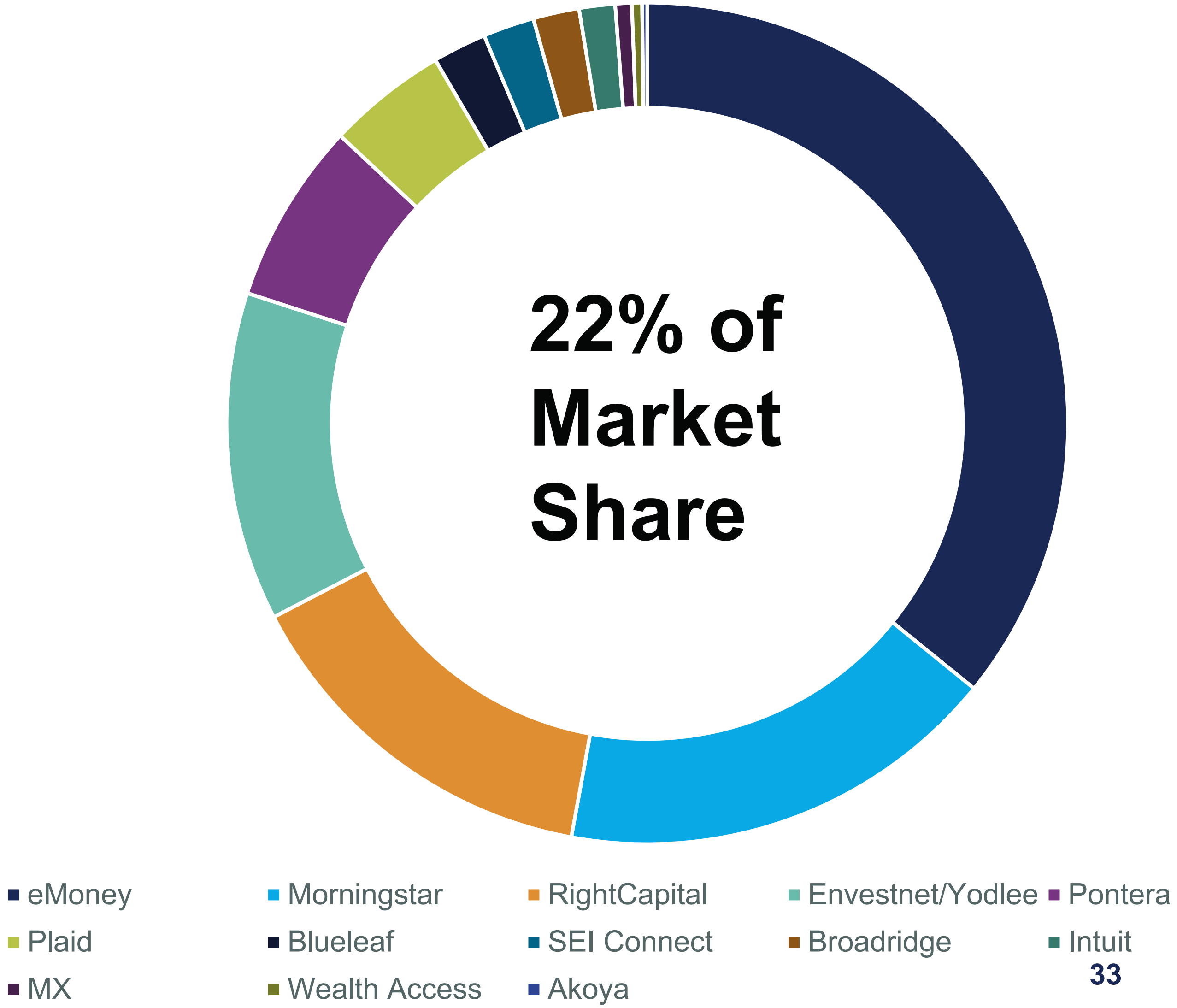
Stability & Security

- 82% of all aggregated accounts are via API and Bulk file
- 900+ new sources added in 2022

T3 Survey Results

*We are **THE** industry leader in account aggregation tools!*

Account Aggregation Tools	Average Rating
eMoney	**8.11**
Morningstar/ByAllAccounts	6.10
RightCapital	7.90
Envestnet/Yodlee	7.27
Pontera (FeeX)	7.69
Plaid/Quovo	6.16
Blueleaf	6.05
SEI Connect	7.70
Broadridge/Investigo	7.59
Intuit	7.61
AdvisoryWorld	6.86
MX	6.31
Akoya	5.75



Competitive Landscape

Tom Howell
Director, Product Marketing

eMoney is the financial planning industry brand leader

We own market equity for being the **leader in financial planning technology.**

eMoney	ENVESTNET MoneyGuide	RightCapital	ORION ADVISOR TECH
91%	83%	87%	82%

Source: Planning Competitive Intelligence Quant – April 2023

eMoney is the financial planning industry brand leader

We have the highest brand metrics for **awareness**, **purchase consideration**, and **choice.**

eMoney	ENVESTNET MoneyGuide	RightCapital	ORION ADVISOR TECH
55%	45%	32%	53%
63%	55%	54%	61%
43%	28%	20%	29%

Source: Planning Competitive Intelligence Quant – April 2023

How are we positioned against our competition?

We lead on what prospects care about most **customer support**, **leadership in financial planning technology**, and **value for the money**.

Source: Planning Competitive Intelligence Quant – April 2023

What our clients have to say

eMoney helps me **win new customers.**

“We demoed eMoney to this huge client, and he said, ‘People have shown my stuff like this before, but they can’t ever get my accounts linked.’”

*“I convinced him to try it, and all three of his connections linked. **He was so amazed. Now we manage over $30 million for him**, and he logs on to the eMoney portal every single day. eMoney really helped us seal the deal.”*

- Donna Murray, CFP®, ChFC®

Source: eMoney Case Study: SouthState Wealth

How are we positioned against our competition?

While Right Capital competes with us in brand equity and satisfaction—our latest research shows they actually have the **least satisfied and loyal customer base.**

25% are Mercenaries, price-sensitive, swayed by cost, and the most likely to switch.[1]

While eMoney's Loyalists rose 38% year-over-year in 2022.[2]

1) Planning Competitive Intelligence Quant – April 2023, 2) Year End Loyalty Tracking – February 2023

That’s why

43% of advisors would choose eMoney if they had to pick a platform today.

No competitor exceeds 30%.

Source: Planning Competitive Intelligence Quant – April 2023

What people have to say about our new features

What our clients are saying...

Technology Strategy

Melissa Sumner
SVP, Enterprise Architecture

Architecture Review of EMA application

Current Deep Dive Review

- Knowledge of the overall system and deep knowledge on target areas
- Prepared useful documentation
- Study dependencies between software components enabling incremental architecture design
- Incentive review and analysis

Product Research

- 310 needs statements and concept brainstorm and testing
- Design testing
- Multiple client visits and conversations
- Research and analysis to define future state experience

Architecture Reviews

- Ingest understanding of EMX current and future capabilities and architecture
- Incentive technology retro
- Gathered input from internal stakeholders
- Review of industry trends to select best technologies for operations and development

- Efforts **confirmed focus** on Sim, Facts and Reports, but added additional area, configure/feature flags/authentication
- Product vision combined with deeper understanding of existing platform – yields perspective that this **initial approach will yield significant benefits**
- Approximately **80% reuse of Incentive** technical decisions and processes
- Technology team aligned approach around the goals to **“Grow” “Lead” and “Expand” with a focus on increasing speed to value and the dual mandate**

Architecture Vision Principals

Technology standards and design principals will target outcomes **that accelerates value delivery to our clients**

Grow

- **Scale EMX** in areas that align with Product vision (i.e. monte carlo calls/hr)
- **Scalability of Development team:** well defined boundaries reduce the volume of knowledge required to be effective

Lead

Evolvability of technology: Service technical options **are not constrained by the monolith** and may use the right technologies for their cases.

Expand

Parallelization of development: Development and testing across different work areas can occur in parallel.

Composability of new or changed services

- New development and test efforts are easily integrated into the product without disrupting existing code and features.
- Improved capability for assembling more modular experiences from the APIs and components

Technology Strategy for EMA

Goal is to build out new modern architecture patterns while continuing to enable critical features for customers. Future features will be enabled through these patterns.

1. Monolith decomposition will largely follow the code first pattern allowing faster time to value and reducing risk

- Three options: Split Database first, Split code first, split code and database
- Decision made: **Split Code first**

2. Simulation, Monte Carlo and Fact management will evolve to separate macro services through code refactoring

- Commingled code is challenging to parallelize development
- The technology itself **[C#] is good**
- **Refactor code** to separate functional concerns and Business logic from UI logic
- Extract new independent services from the monolith, **deploy in AWS**

3. Fact user experience and reports and presentations will be replaced with modern architecture patterns and technologies.

- Old tech, architecture and user experience
- New technology with **modern UX paradigms, modern web arch** with **single page app** and **API interface to business logic and data services**

Code refactoring and building new user experiences will separate the core financial planning capabilities from the monolith

Nexus Status Update

2023 focus on foundational buildout and pilot of gatherers in AWS. 2024 targets migration of gatherer workload to AWS. Residual workload will be moved to AWS in 2025.

Aggregation (Nexus) technology strategy will focus efforts on the separation of **data gathering** from the **data storage and sharing**

- While significant improvements were made in availability and scalability, the current architecture needs ongoing work to scale to projected growth over the next 5 years
- **Modernization/Technology strategy remains unchanged**:   The application will be decomposed into discrete work loads and deployed to AWS. This will allow independent scaling and application of cloud native technologies while leveraging existing IP in the parser space.
- Strategy remains anchored in vision principals of **Grow, Lead and Expand and aligned with dual mandate**

Key Wins to date:

- Assembly loader and queue rebalance moved to Nexus worker containerized POC deliverable starting Q3. Determined not to be critical pathway for Phase 2
- AWS consulting project for **bulk file load POC nearly complete** for loading eMoney standard files
- **Message refresh on target** for first scraper in production delivering end of May

Technology strategy timeline

Initial scope for EMA and Nexus targeting completion by end of 2026. Investments in these areas will taper as efforts complete over the next 3.5 years, allowing for year over year improved profitability.

EMA

Q1’2023	Q2 – Q3’2023	Q4’2023 – Q3’2026	Q4’2026
Research	POC architecture designs and exemplars	Execute / Deliver on POC	Complete Decommissioning old code in monolith

Nexus

Q1’2023	Q2 – Q3’2023	Q4’2023 – Q3’2025	Q4’2025
Execute on POC bulk files	Deliver on POC End of Q3	Finalized Bulk Files and workload migration to AWS	Finish migration and decommission old code

Technology strategy supports dual mandate to capture opportunities in the short-term while modernizing our tech stack to ensure long-term growth…

Planning	Portal	Aggregation	APIs/Integrations
Objectives: • Reduce time to plan • Elevate providers' planning capabilities • Enable action within a planning context • Track progress & value over time	• Capture the value we deliver today • Deliver best-in-class digital engagement • Create a premium lead generation capability • Componentize to enable more integration	• Comprehensive data coverage • Stable and consistent access at large volume • Streamlined processes to add institutions • Visibility and understanding of aggregated data	• Power the industry's planning capabilities • Expand library of externalized APIs • Improve developer experience • Identify strategic partnerships that can – Broaden distribution – Generate new revenue streams – Add functionality to our application

Technology strategy enabled

Radnor Office Update

Doug Lane
Controller

Radnor Office Update

Existing Radnor Space

- Lease ends October 31, 2023
- Space is available for use - September 30
- Status of furniture & fixtures, equipment, and wiring
- Technology infrastructure decommissioning – October 1

New Radnor Space

- New space (3,900 sq. ft.) in the same building on the 2nd floor
- Lease starts Nov. 1

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Upcoming Events

Joanne Del Signore
Head of People Experience

Upcoming Events

PEER-TO-PEER COFFEE TALK	**The EEC just** wrapped on the April 27 session – which focused on culture. Be on the lookout for future sessions!
May DEI LUNCHEONS	First round of luncheons being scheduled for May.
May 23 VIRTUAL COOKING CLASS	May 23 @ 4:30 p.m. ET. **RSVP by May 12** to participate. More info on the **life@eMoney Intranet > Company News.**
May & June CLT OFFICE HOURS	Next two sessions: **May 16 & June 20**. Sign up on the **life@eMoney Intranet > About eMoney > CLT Office Hours.**
June MEET THE FINANCE TEAM	Scheduled for the week of June 12. Stay tuned for meeting invite via Outlook and for additional business unit sessions in coming months!

Question & Answer

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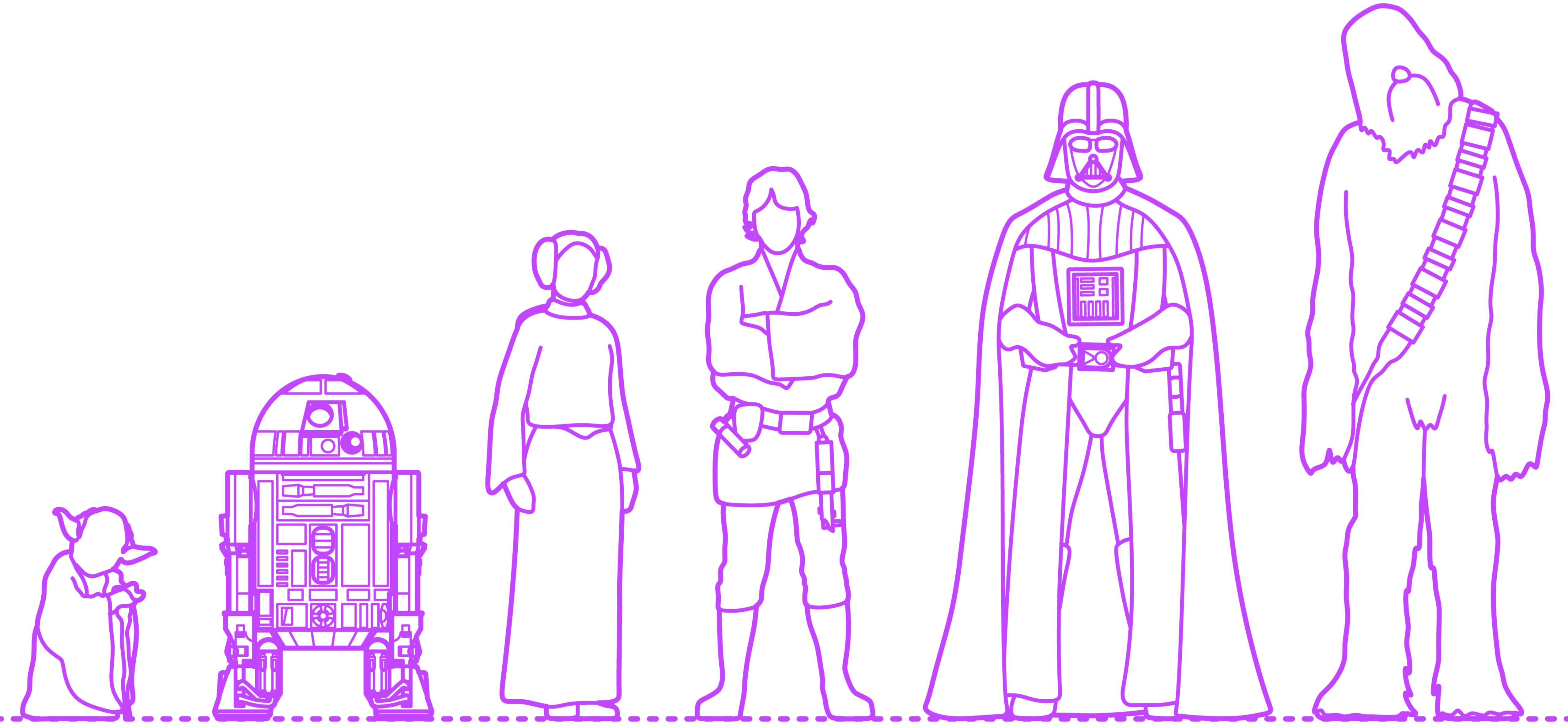
MAY THE FOURTH BE WITH YOU

Who is your favorite character from Star Wars?



Question & Answer

Wait! Don't leave yet...

We're trying something new.

Please stick around after the event ends to take a quick survey in your browser.

eMoney