Meet the Team
Client Services

August 23, 2023

eMoney

Welcome

Frank Tropiano

Head of Client Services

Agenda

Welcome/ Business Unit Overview

Connecting to eMoney's Mission and Vision

Meet the Teams

Questions

eMoney

Connecting to eMoney's Mission and Vision

Frank Tropiano
Head of Client Services

Client Services

Client Implementation

Sales Engineering
Implementation Eng.
Program Management

Client Service

Coaching & Training
Client Service Mgmt.
eLearning
Data Entry
Client Service Ops

MISSION
Helping people talk about money

VISION
Financial peace of mind for all

Relationship Management

Client Support

Call Center
Help Desk
Technical Support
Call Center Ops

Client Implementation

Alana Harper

VP, Client Implementation

Client Implementation Management Team

Alana Harper
VP, Client Implementation

Sales Engineering

Implementation Engineering

Doug Dinwoodie
Director, Client Implementation
(Program Management)

Robert Amadio
Manager, Client Implementation

Sean Donovan
Manager, Client Implementation

Sales Engineering

- Collaborates with eMoney’s Sales and Relationship Management teams to support the technology sales process.

- Works with prospects and existing clients through discovery, requirements elaboration, and transition into implementation.

- Aligns customer business needs with solutions available across eMoney's product portfolio.

118

Sales opportunities supported

with

32

Closed / Won!

Implementation Engineering

- Responsible for technical consultation throughout the client implementation lifecycle.

- Platform experts, supporting CI Program Managers and multiple other departments with deep technical analysis & guidance.
  - Configuration
  - APIs
  - Queries
  - Research & Analysis
  - Feature Releases
  - Core Platform Change Management

FPG Externship Support

562

Users loaded

New Transamerica Installation

Moved…

70
Users

3K+
End-clients

Securian to Cetera Office in EMA

Moved…

1.1K
Users

78K
End-clients

Supported FPG & Product transition from FactSet to Refinitiv market index data

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Program Management

- Designs, builds, and delivers client projects & and supports client review cycles for large enterprise clients.
- Supports clients throughout their relationship lifecycle.

Two Client Implementation Program Management Teams

1. **Implementation Program Management**
   - Requirements gathering & elaboration
   - Configuration
   - Implementation & API consultation
   - Program management and maintenance across small to supersized, highly complex implementation projects
2. **Feature Review Program Management**
   - Periodic business & compliance feature reviews for eMoney's large enterprise clients
   - Program management and maintenance for client projects

eMoney

27 Key Enterprises

96 New Projects YTD *(an 8% increase vs. same period in 2022)*

9 Executed Statements of Work (SOWs) for development with Prod-Dev over the past year

306 Maintenance Cases YTD *(a 51% increase vs. same period in 2022!)*

26 Product features reviewed

with 27 key enterprises over the past three review cycles...

These clients represent ~40% of eMoney ARR!!

Career Development Highlights

5

Promotions
in last year

Promotions

- **Erin Bietila** – Program Manager
- **Amanda Falcon** – Program Manager
- **Paige Selesky –** Program Manager
- **Tara Dillon** – Sr. QA Analyst
- **Sean Donovan** – Manager, Client Implementation

1

New Hire

New Hires

- **Jean-Paul ("JP") Gooden** – Sr. Program Manager

Contacting Client Implementation

The Scenario	How to Request CI Support
Client Implementation Public Teams Chat Room • To ask questions to CI department • To share information with CI department	Teams Room Name: **Client Implementation – Public** (Please do not send to the “Client Implementation” email group for questions or requests; it is reserved for departmental corporate communications & internal CI use.)
CI Management Assistance	Email to: CIManagementTeam@emoneyadvisor.com
For Sales & RM: Requesting Sales Engineering Support For a SalesForce Opportunity where there are Technical Needs	Set the SalesForce Opportunity to "Evaluating” Stage – “Technical Requirements (SE)“ This will trigger an automated request for Sales Engineering support
For Sales & RM: Requesting Program Manager for Implementation Support • For a Closed / Won Salesforce Opportunity with technical needs • Client project is ready for implementation work	Use Chatter in the SalesForce Opportunity to: @Douglas Dinwoodie @Robert Amadio @Alana Harper
Configuration Maintenance & Updates • Maintenance for a previously purchased configured enterprise / office • Client contract indicates the client is entitled to the update	Email to: CIMaintenance@emoneyadvisor.com **(Internal use only email address)**

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Client Service

Linda Bello

VP, Client Service

Client Service Management Team

- **Linda Bello** — VP, Client Service 
  - **Eric Carroll** — Director, Client Service 
    - **Ben Bernstein** — Manager, CSM 
    - **Jake Carwile** — Manager, eLearning 
    - **Steve Sharp** — Manager, Data Entry & Migration Services 
  - **Roseida Cotto** — Manager, Client Service Operations 
  - **Leah Simoglou** — Director, Client Success 
    - **Daila Boufford** — Manager, Training 
    - **Alli Burnett** — Manager, Success Coaching 
    - **Moira Messner** — Manager, Success Coaching 

Client Service Operations

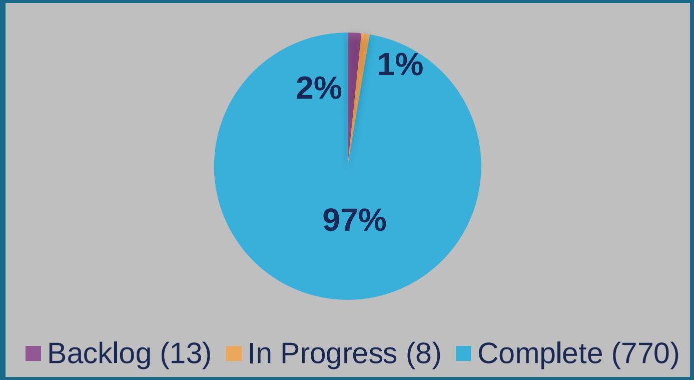
The Client Service Ops team manages a portfolio of **initiatives** to ensure successful and on-time delivery of all **Client Service projects** working with other teams across the organization to ensure continuous process improvement to achieve results.

- The team is responsible to understand the **tools used** by the team to ensure efficiency, scale, and optimization.

- The team leads, managers, and delivers all Client Service projects and technology improvements, such as workflow and process improvements.

- The team focuses on reporting, data analysis, and technology optimization.

All tasks are tracked in JIRA



Key Closed Projects

- **JIRA –** enhanced Client Service Ops project
- **Gong** – implemented in Coaching
- **OmniChannel** – implemented in Data Entry
- **Salesforce** – enhancements for Client Service
- **Training Link –** added to blue nav bar & footer

Client Service Management

The CSM team provides consistent service and support for **key home office contacts** to ensure success and satisfaction.

- The team **champions operational and technical production issues** to allow the home office to spend less time tracking details and more time serving their clients.
- The CSM team **serves as the home office point of contact** for production related issues, so the home office always knows who to contact for escalations.
- The team works collaboratively with internal teams **on behalf** of the client to **manage cases** – all while keeping them informed of the progress along the way.

110
Clients

16,469
Total Cases

46
Open Cases

4
Avg Days to Close

eMoney

Data Entry and Migration Services

eMoney's Data Entry team provides **setup and maintenance** of advisor's clients data on the eMoney system. Our highly skilled specialists **systematically migrate or manually enter client data** in a secure work environment so the advisor can focus on what they do best — connecting with clients and building their business.

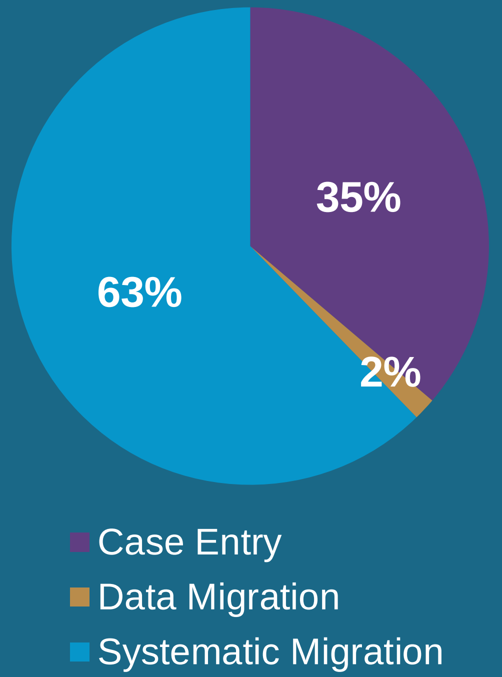
How the team helps advisors:

- Using **systematic tools**, the team migrates the advisor's client data between eMoney installs.
- **Manually** add or update client information in the application, including income, expenses, liabilities, property, investments, insurance, and more.

Benefits to the advisors:

- **Optimize** the client entry process.
- Onboard clients more **quickly** and **increase** speed of adoption.
- Increase client **retention.**
- **Scale** their practice more effectively.
- It's easy. It's **secure.** And it helps advisors save time and serve their clients more efficiently.

- **724** cases submitted
- **233** cases billed
- **25,444** client records updated
- **$216,294** billed
- Consistent **year-over-year growth** in cases submitted, net billed, and clients updated!



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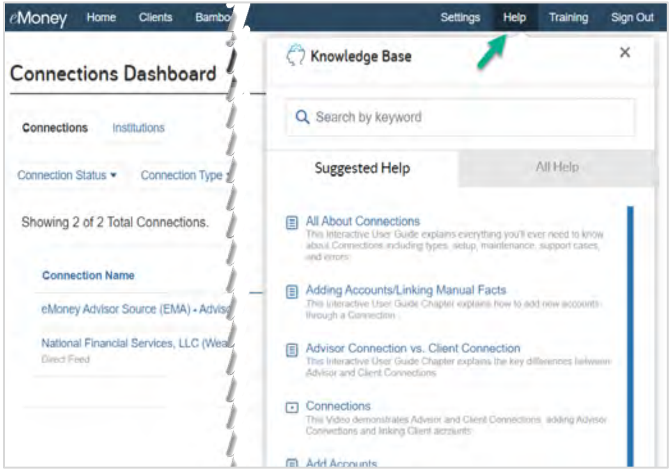
eLearning

The eLearning Team **builds and maintains** the eMoney platform **online help**, such as user guides, videos, how-to navigational walk throughs, pop-ups, and interactive guides.

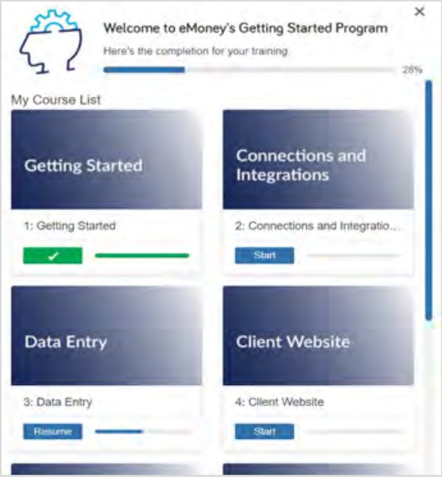
The team also builds and maintains **interactive, self-paced coursework** that users can take at their own pace, prior to a training or coaching session, or as a refresher.

Quizzes and assessments are available throughout the courses to test the user's skill level and content comprehension.

Context-Sensitive Help



Training / Self-Paced Courses



553,855

Clicks YTD!

Advisor Site Content

1,064 resources

39,620 unique users

346,570 clicks

Client Site Content

50 resources

56,140 unique users

88,301 clicks

Self-Paced Coursework

176 resources

12,223 unique users

118,984 clicks

Client Success Coaching

The Coaching team conducts **personal coaching sessions** for advisors. The Coach helps to expand the advisor's knowledge and skills of the eMoney platform, allowing them to fully implement eMoney into the practice!

- The coaching team is responsible for **onboarding** our new (and upgraded) users.
- The team uses **Outreach** to schedule calls and **Gong** to record calls.
  Call monitoring tools allow the Coaches and Managers to review calls for quality and training purposes.
- The coaching sessions are part of the **Getting Started Program (GSP).**
  The Coaching team and Training team provide GSP 'core concept' sessions that include the following topics:

Coaching GSP	Training GSP
• Getting Started • Optimizing Aggregation • Rolling Out Your Client Portal to Market • Building & Presenting a Plan	• Navigating eMoney • Entering Data • Troubleshooting Reports & Creating Presentations • Initializing Your Client Experience • Build a Plan Using Advanced Planning • Presenting with Goal Planner • Build Your Knowledge of Decision Center • Creating a Simple Plan *These sessions are now provided via recorded webinar.*

11,951
Scheduled Calls

1,505
Participating Firms

2,962
Advisors

67%
Graduated To-Date

Client Training

The Training team builds and manages **user training programs** for advisors and users ranging from **beginner to intermediate to advanced**. The team provides **standard** and **custom** training, both virtual and in person.

Programs include:

Training Workshops	Webinars & Recordings	Custom Training
Collaborative and interactive sessions that provide hands-on training, individualized support, and the opportunity to ask our experts questions and get answers. Sessions include: • Platform Essentials • Planning Fundamentals • Comprehensive Planning	Live and recorded sessions that include: • GSP Core Concepts (on demand) • Intermediate Series (daily) • Advanced Series (bi-weekly) • Impactful Extras (bi-weekly) • Product Updates (monthly) • Bamboo (on demand recording) Firm specific training that is defined during the contract process may include: • Home Office Training • Train-the-Trainer Programs • Configuration Training	Custom training is offered to firms looking for a more personalized training. The Trainer and firm partner to design the custom agenda that is tailored to the firm's business and learning objectives.

380
Sessions Conducted

23,379
Attendees

6,258
Unique Advisors

89%
Still Active (2022 Attendees)

Client Service Career Development Highlights *(last 12 months)*

4

New Hires

- **Geoffrey Alberstadt** – Client Success Coach (Feb 2023)
- **Zac Buettner** – Client Success Coach (Jul 2023)
- **Gabriel Cruz** – Client Service Ops Specialist (Apr 2023)
- **Keiyana Jones** – Client Success Coach Admin (Feb 2023)

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Promotions

- **Rachel Adame** – Sr. Client Success Coach (Jun 2023)
- **Jacob Carwile** – Manager, eLearning (Dec 2022)
- **Camille Cortina** – Advisory Client Success Coach (Jun 2023)
- **Roseida Cotto** – Manager, CS Operations (Jun 2023)
- **Mary Cate Fox** – Sr. CSM (Oct 2022)
- **Ryan Klinges** – Advisory eLearning Specialist (Jun 2023)
- **Sarah Rogers** – Advisory CSM (Mar 2023)

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Promotions to Client Service

- **Ben Bernstein –** Manager, CSM – Jun. 2023
- **Eric Carroll –** Director, Client Service – Apr. 2023
- **Mike Garcia –** Training Specialist – Mar. 2023
- **Andrew Guenther –** Client Success Coach – Oct. 2022
- **Mikaela Rhoads –** eLearning Specialist – Jan. 2023
- **Steve Sharp –** Manager, Data Entry – Dec. 2022

Contacting Client Service

Team	Internal Use Only	External Use Only
Client Service Management	CSMDept@emoneyadvisor.com	CSM@emoneyadvisor.com
Client Training	LiveTraining@emoneyadvisor.com	Training@emoneyadvisor.com
Coaching	SCLeadership@emoneyadvisor.com	Onboarding@emoneyadvisor.com
Data Entry	DataEntryDept@emoneyadvisor.com	DataEntry@emoneyadvisor.com
eLearning	eLearning@emoneyadvisor.com	KnowledgeBaseContent@emoneyadvisor.com

IMPORTANT NOTE:

All external-facing email addresses create a Salesforce case. Internal team members should **only** use the external email address when a Salesforce case is needed.

For questions that do not require a case, please use the internal email addresses or the applicable Teams chat.

Call Center Support

Alex Rivera

VP, Call Center Support

Call Center Support Management Team

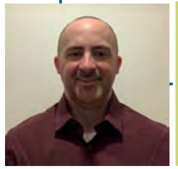
Alex Rivera
VP, Call Center Support

Mike Clark
Manager, Training & Development

John Vanderipe
Manager, Workforce Management

OPEN ROLE
Director, Technical Support

Brett Billingsley
Manager, Technical Support



Jamie Berridge
Manager, Client Support

Client Support

Our first line of support that directly handles all initial contacts from our clients offering a multi- channel approach (phone, email, and chat). Client Support consists customer obsessed team members, made up of the following teams – each of which are led by a Client Support Supervisor:

- 4 Phone Support Teams
- 1 Chat Team
- 1 Email Team
- 1 Help Desk Team

Fun Facts YTD:

- **1,215,167** minutes on calls
- **334,111** minutes on chats
- **153,109** minutes on emails

Total 1,702,387 minutes supporting clients

97.8%

CSAT score YTD – up 1.2% from 2022

93%

First contact resolution – up 1% from 2022

96.7%

Overall experience – up 1% from 2022

Client Support Specialists: Phone + Digital

Client Support Specialists are customer obsessed and are responsible for:	
Delivering exceptional and memorable service on each customer interaction #customerfirst	Solving customer issues and answering incoming customer inquiries
Handling cases related to at least 10 major areas of the eMoney platform	Escalating cases to tier two teams or management when necessary
They demonstrate a **commitment to customer satisfaction** and **maintain high levels of call, chat, and email quality and professionalism**. The Client Support Specialist consistently meets or exceeds the efficiency standards set forth by the company and displays ownership when handling customer requests.	

Digital team

5 Email Support Specialists
8 Chat Support Specialists

Phone team

10 Assoc. Client Support Specialists
24 Mid-level Client Support Specialists
4 Senior Client Support Specialists

Case Types			
Incoming calls and chats related to..		Incoming emails related to..	
Data aggregation	Client site	Move clients	Data aggregation
Advanced Planning	Fact entries	Update contact info	Add support
Presentations	Planning tools	Duplicate contacts	
Reports	Integrations	Update client username	

Supervisors and Help Desk Product Support Specialists

Client Support Supervisors are people and customer obsessed and are responsible for:	
Daily management of Client Support staff - Coaching and providing feedback for team members	Receive complaints, resolve problems and manage elevated calls from clients that require interaction with a supervisor, as acting as point of contact with internal departments to resolve issues
Career development for team members, creating a positive and engaging work environment	Maintain knowledge of eMoney's product and enhancements to support clients and staff

Client Support Supervisors

5 Client Support Supervisors

Helpdesk Support Specialists are customer obsessed and are responsible for:	
Answer client inquires and serve as the first point of escalation for call center representatives in an effort to provide quick and efficient resolution to eMoney clients.	Serve as an immediate source of advanced level product knowledge on the eMoney platform.
Monitor gaps in product knowledge and identify trends and opportunities for enhancing the overall client experience as well as the needs of the Call Center Representatives.	Act as subject matter experts for the eMoney platform and for any new features/enhancements that are released.

Help Desk Product Support Specialist Team

4 Help Desk Product Support Specialists

Call Center Operations

The Call Center Operations team is responsible for supporting the 100+ employees within Client Support. Managing all daily operational activities and processes. Hiring and training customer obsessed people. Developing ongoing leadership training. Creating scalable, repeatable, and customer centric processes. And scheduling, forecasting, capacity planning and reporting.

eMoney's Call Center Operations is comprised of two functional areas:

- Workforce Management Team
- Training and Development Team

Workforce Management Team

The Workforce Management Team's primary responsibilities include:

- **Forecasting** – predicting future contact volume all channels
- **Staffing** - how many employees are needed to support our clients
- **Coordinating** - real time queue and schedule adherence monitoring
- **Trends** - monitoring contact trends for unexpected changes in volume
- **Reporting** - Building reports to track all KPI's
- **Processes** - Creating scalable, repeatable, and customer centric processes

The best way to contact the WFH team is by sending an email to wfm@emoneyadvisor.com.

41 second average speed of answer during peak season

30 second average speed of answer for chat

100+ reports and dashboards in Looker

3K hours of training

1.7K+ hours of activities focused on team building, coaching, mentoring and/or attending company events.

YTD Service Levels

- 100% - LBS
- 99% - AYCO
- 98% - Forecast for first half of 2023
- 95% Rockefeller
- 86% - Tier 1 Client Support (Phones)

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Training and Development Team

The Training & Development Team – is responsible for the following:

- **Hiring and Training the Best -** New hire training and onboarding. Promotional training and ongoing skill-based training
- **Content Management** - Develops and maintains knowledgebases, content, and resources for Client Support representatives.
- **Collaboration -** with teams across the org for feedback and trainings for product releases and enhancements.
- **CS Voice of the Customer** conducts monthly sessions to review VOC items in User Perspectives meetings.
- **Technology** - Works closely with WFM, APP Support and Internal Systems to identify technology enhancements that provide more efficient service and support options

Contact the Training and Development Team:
CSInternalTraining@emoneyadvisor.com

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Responsible for 400+ Seismic knowledge articles. These are used by three teams: Client Support, Client Services (Training), and Sales.

100+ eLearning courses in LMS. Developed, maintained, facilitated, and archived each course.

134 Client Support team members graduated from new hire/promotional training programs since 2019.

100% of Client Support team members feel onboarding /promotional training effectively prepared them for their roles.

All T&D teammates were certified in their respective fields by the Association of Talent Development in 2022.

Technical Support

The Technical Support team plays an active role in the overall client experience. They create scalable, repeatable and customer centric processes. Use and build technology to make it easier for Client Support to deliver consistent and repeatable customer experiences.

And are a point of escalation for troubleshooting client issues, proactive data analysis, and working with internal teams until the final resolution of a reported problem.

The Technical Support team is comprised two groups:

- Application Support
- Data Support

Rolled out Application Support Customer Satisfaction Score (CSAT)

This allows us to better engage with our users and improve the client experience. All three technical support groups now have CSATs associated with their cases.

99.5%

CSAT score for first half of the year!

Technical Support: Data Support

Data Support manages and supports the day-to-day data transfer processes.

Data Support Team is responsible for:	
Troubleshooting of all data aggregation-related issues *Includes advisor & client connections*	Assisting end users directly as it relates to problems reported
Serve as an internal escalation group that assists Client Support, Sales, Relationship Management, CSM and Application Support with connection and integration related issues	Troubleshooting of all data aggregation-related issues Includes advisor & client connections
Review issues escalated by the Data Support representatives	Mitigates ongoing aggregation issues by building scalable, repeatable and customer centric processes and using technology

Data Support Team

7 Data Support I Analysts

1 Data Support II Analyst

6 Technical Data Analyst

2 Data Support Supervisor

Case Types	
Username and password being rejected or account locked	Monitoring Nexus Tasks
Extra security (access code or security questions)	Management of Financial Institution Technical Contacts/Accounts
Missing or duplicate transactions appearing	Missing accounts or accounts not importing
Wrong account values showing for aggregated accounts and out of date values	Monitoring overnight batch/load processes to proactively troubleshoot issues that are found

Technical Support: Application Support

Application Support primarily supports Client Support, Sales, Relationship Management teams and our clients with technical issues related to the application.

Application Support Team is responsible for:	
Troubleshooting browser issues	Researching system behavior to determine if they are bugs or by design
Assisting Ops department in identifying impacted installs during outages	Building deep knowledge of eMoney's integrations to support our clients

Application Support Team

- **3** Technical Support Analysts
- **1** Senior Technical Support Analyst
- **2** Technical Support Engineers
- **1** Technical Support Supervisor

Case Types	
Application Errors (EMA and all installs)	2FA issues
Display issues within the application	Client Site error
Integration errors/questions	Login errors
Presentation failures	eMoney Access (API)

Call Center Support Career Development Highlights

7

Promotions

Promotions

- **James Berridge** – Manager, Client Support
- **Emmett Devlin** – Supervisor, Client Support
- **Lucas Flavin** – Senior Client Support Specialist
- **Alexander Rose** – Senior Client Support Specialist
- **Anthony Grimaldi** – Senior Technical Support Engineer
- **William Woodruff** – Technical Data Analyst
- **Nick Pipher** – Technical Data Analyst

7

Transitions

Transitions from Client Support

- **Ben Bernstein** - Manager, CSM
- **Eric Carroll –** Director, Client Service
- **Julia Capatch –** Sales Development
- **Tarnisha Bruce** – VP, Relationship Management
- **Lashay Valasquez** – Pricing Analyst
- **Linda Sang** – Data Support Analyst
- **Chiberu Egandu** – Technical Support Analyst

5

New Hires

Recent New Hires

- **Rio Moore** – Client Support, Supervisor
- **Jessica Marciniak** – Client Support Specialist
- **Saheli Banerjee** – Client Support Specialist
- **Brandon Perez** – Client Support Specialist
- **Nick Houston** – Supervisor, Technical Support Engineering

Contacting Client & Technical Support

Scenarios	How to Request Support
Technical Issue Related to a Connection • New Prospects with Tech Needs • Expansion of what Client already has ****Technical Issue Related to the Application:**	Ask client – have you reported a problem on that connection? • **If Yes**: Obtain that case/ticket number. • **If No**: Ask them to, then have them provide the number. • Send an email to TechSupportManagers@emoneyadvisor.com providing: • Case or Ticket number • Brief explanation of their complaint/request • Reason it's being escalated (business impact) ******If application related, there won't be a case/ticket – proceed directly to sending an email with the explanation of issue and reason it's being escalated. The Tech Support Managers will then ensure that the issue is escalated and follow up with the client
Client Support Questions/Issues	**Client Support Tier 1 Representatives** - **This team should be contacted by our clients for any questions related to the eMoney platform** - Phone- 888-632-8482 (M-F 8am-8pm EST) - E-mail- Customerservice@emoneyadvisor.com (M-F 8am-8pm EST) (External Use Only) - Chat- Must be done through the chat feature in the Application (M-F 8am-8pm EST) **Instances involving**: • Irate advisor • Situation requiring white-glove service • Situation in which you've already worked with T1, but now need to escalate Escalate by sending an email to: cselevation@emoneyadvisor.com Not sure? Send email to CS Managers to: ClientSupportManagers@emoneyadvisor.com
General Questions *NOT specific to an opportunity or client*	**Connection Related:** ConnectionSupport@emoneyadvisor.com (External Use Only) **Application Related:** AppSupport@emoneyadvisor.com **Planning Related/Other:** Post question in CS Escalation – Public Teams Room **Admin Related** (security, client add/drop, licensing): Customerservice@emoneyadvisor.com (External Use Only)

All emails are INTERNAL USE ONLY unless noted otherwise.

Contacting Client & Technical Support (Cont'd)

Teams	How to Contact
Application Support App Support should be contacted for any technical issues related to the application (see list of common scenarios on previous team slide)	— **Phone Queue:** ext. 8012 — **Email:** AppSupport@emoneyadvisor.com
Data Support Data Support should be contacted for any end user reported issues related to a connection. Before contacting Data Support, you should ensure that the user has 'Reported a Problem' on their connection to generate a case.	— **Phone Queue:** ext. 8050 — **Email:** ConnectionSupport@emoneyadvisor.com — **Should only email in the event that a case cannot be generated on the connection directly or for something unrelated to a specific connection.**
Technical Data Analysts Technical Data Analysts should be contacted for data aggregation related issues/requests on a larger scale than a single user connection.	— **Feed/API inquiries:** DataFeeds@emoneyadvisor.com — **Parser and other inquiries:** AggregationSupport@emoneyadvisor.com — **Internal only inquiries not related to one of the above topics**: TDAGroup@emoneyadvisor.com. — **NOTE:** This is **not an external facing email**, contacts outside of eMoney will not be able to email this address.

eMoney

All emails are INTERNAL USE ONLY unless noted otherwise.

Relationship Management

Tarnisha Bruce

VP, Relationship Management

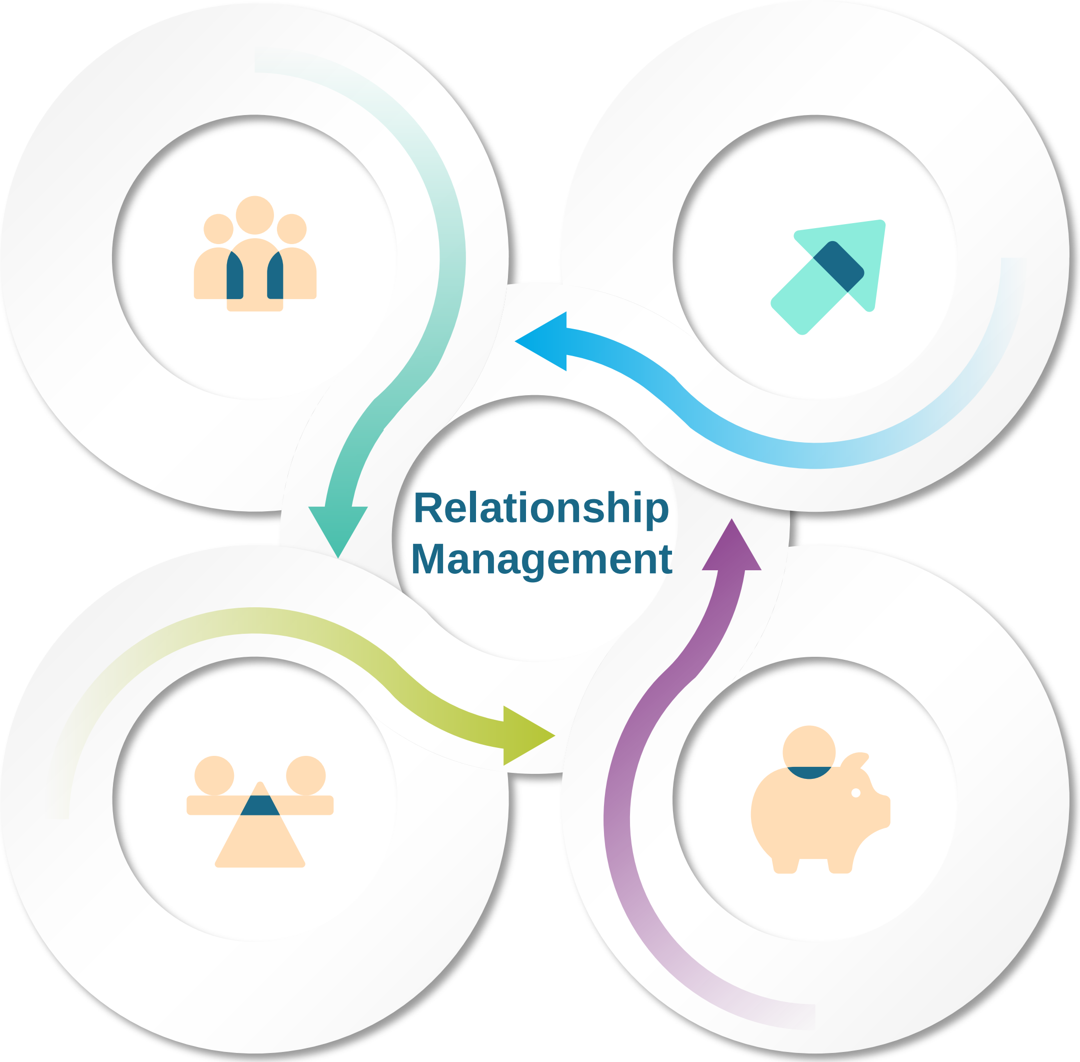
Relationship Management Team

Relationship Owners

Strategic Business Partners that proactively ensure eMoney is targeting the client's business goals while engaging cross-functional teams to strengthen our value proposition to retain client loyalty.

Mitigate Risk

Identify, prioritize and minimize risks. Focused attention towards churn reduction.



Drive Usage & Adoption

Understand product roadmap, competitive market data & trends in order to engage clients in thoughtful conversations around objectives & success measures in order to craft adoption campaigns.

Source New Opportunities

Listen and seek out opportunities to assist sales with expansion goals and forecasting of revenue potential.

Relationship Management - Internal Collaboration

Growth Opportunities

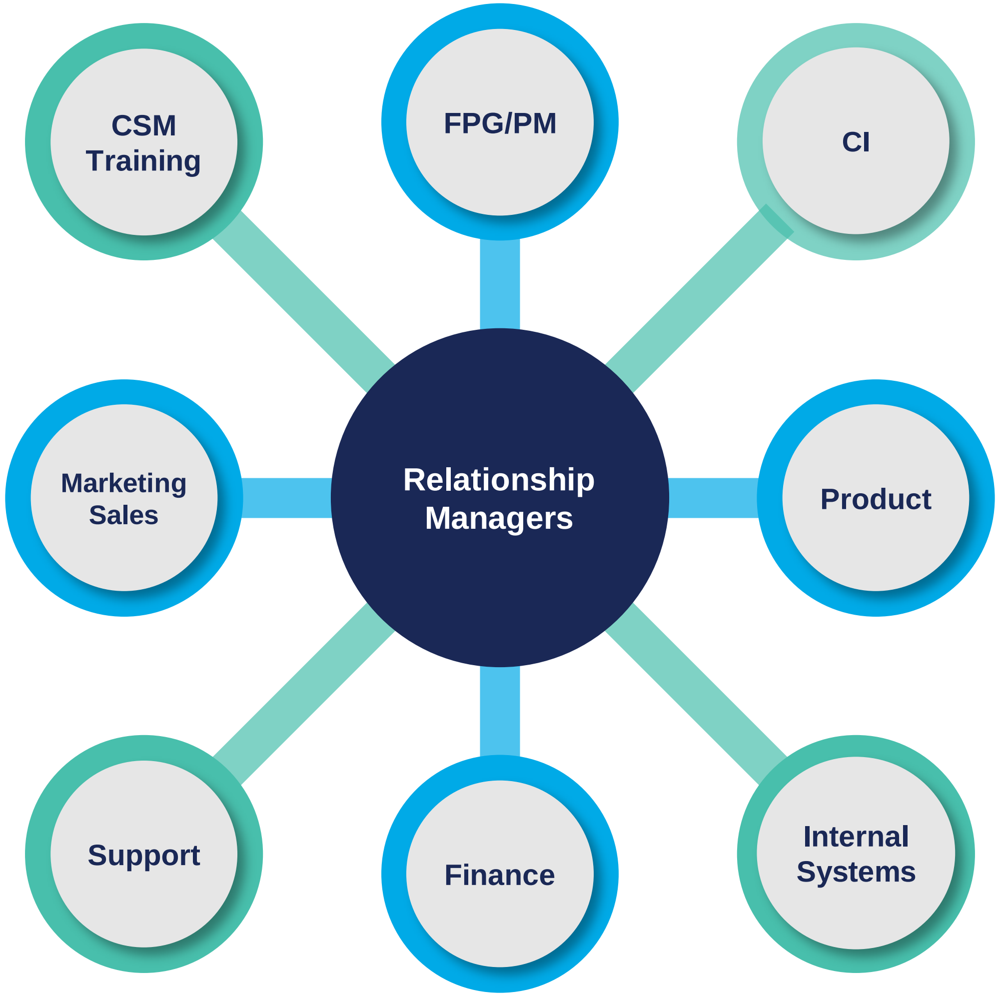
Place energy into seeking revenue generators and license/seat expansion.

Continuous Learning

Utilize internal knowledge resources and teams like FPG and Training to drive best practices in product use.

Transparency

Maintain and share pertinent client information that summarizes the overall strength of the partnership.



Bi-Directional Updates

Work with internal partners to share client pain points and concerns.

Product Roadmap

Maintain awareness of product roadmap items and advocate for more utilization by the clients.

Marketing Support

Engage with Marketing to drive branding and notable public engagement.

Career Development Highlights

Tarnisha Bruce transitioned from Director, Technical Support to **VP, Relationship Management** in 2023!

eMoney Tenure & Career Progressions

16 years with eMoney **– Nicole Prestileo**

- Held roles in Client Support, Training, and Sales prior to moving to Relationship Management in 2013.

12 years with eMoney **– Rachel Davidson**

- Held roles in Client Support, Success Coaching, Live Training, and moved into Relationship Management in 2013.

11 years with eMoney **– Melinda Etheridge**

- Held roles in both Client Support and Training before moving into Relationship Management in 2019.

6 years with eMoney **– Sean Gallagher**

- Started in Client Support and one year later transitioned to Relationship Management.

2 years back with eMoney **– Lisamarie Roberto**

- Held roles in Client Support, Financial Planning, and Sales before leaving in 2015 only to return in 2021.

Contacting Relationship Management

Team	Internal Use	External Use	
EmailRM@emoneyadvisor.com	YES	NO	This is used for all account/client related matters that need to be discussed between cross-functional teams to the Relationship Manager. This email address will be sent to the Relationship Management queue and create a case that will be assigned to the applicable RM.
RelationshipManagement-All@emoneyadvisor.com	YES	NO	This is used for all internal communication related to eMoney activities and events that informs the Relationship Management team.

APPENDIX

eMoney

Meet the Team

Client Services

In the following slides, we’ve included photos, names, and titles of every member of the Client Services business unit.

Sales Engineering

Reginald Hands
Advisory Sales Engineer

Denise Spell
Advisory Sales Engineer

Implementation Engineering

Andrew Propst
Sr. Implementation Engineer

Dan Gresh
Sr. Implementation Engineer

Program Management

Robert Amadio
Manager, Client Implementation

Doug Dinwoodie
Director, Client Implementation

Sean Donovan
Manager, Client Implementation

Erin Bietila
Program Manager

Maureen Carnakie-Baker
Sr. Program Manager

Karly Centanni
Assoc. Program Manager

Jeff DeSantis
Advisory Program Manager

Anthony D'Annunzio
Sr. Program Manager

Amanda Falcon
Program Manager

JP Gooden
Sr. Program Manager

Willie Johnson
Sr. Program Manager

Kelly King
Assoc. Program Manager

Tim Killeen
Advisory Program Manager

Kate O'Mahony
Assoc. Program Manager

Karen O'Malley
Advisory Program Manager

Jordan Schweiger
Advisory Program Manager

Paige Selesky
Program Manager

Julinda Shier
Sr. Program Manager

Salome Tamru
Sr. Program Manager

Elizabeth Wacker
Sr. Technical Project Manager

Client Service Operations

Roseida Cotto
Manager, Client Service Operations

Gabriel Cruz
Client Service Operations Specialist

Keiyana Jones
Client Success Administrator

Client Training

Leah Simoglou
Director, Client Success

Daila Boufford
Manager, Training

Chris Beaver
Sr. Training Specialist

Hannah Tapley
Sr. Training Specialist

Zac Gates
Training Specialist

Brett Tharp
Advisory Training Specialist

Chelsea McGuire
Sr. Training Specialist

Carla Youngs
Sr. Training Specialist

Jenn Rock
Training Specialist

Mike Garcia
Training Specialist

Client Success Coaching

Moira Messner
Manager, Client Success Coaching

Allison Burnett
Manager, Client Success Coaching

Jim White
Client Success Coach

Rhonda Bastarache
Sr. Client Success Coach

Anna Cauffman
Client Success Coach

Michele Bailey
Sr. Client Success Coach

David O'Reilly-Oberneder
Sr. Client Success Coach

Camille Cortina
Advisory Client Success Coach

Evan Gromlich
Client Success Coach

Brian Carver
Sr. Client Success Coach

Andrew Guenther
Client Success Coach

Baba Renfrow
Client Success Coach

Rachel Adame
Sr. Client Success Coach

Debbi Morante
Client Success Coach

Alex Abella
Client Success Coach

Marah Hoffman
Sr. Client Success Coach

Jeff Zenko
Sr. Client Success Coach

Chris DiRubbo
Sr. Client Success Coach

Ania Iguitian
Sr. Client Success Coach

Geoffrey Alberstadt
Client Success Coach

Sarah Murray
Client Success Coach

Zach Buettner
Client Success Coach

Client Service Management

Eric Carroll
Director, Client Service

Ben Bernstein
Manager, Client Service Management

Peter Dugan
Client Service Manager

Tricia McFarlane
Sr. Client Service Manager

Mary Cate Fox
Sr. Client Service Manager

Sarah Rogers
Advisory Client Service Manager

Amy Heffline
Advisory Client Service Manager

Craig Somers
Advisory Client Service Manager

Steve Marzeotti
Advisory Client Service Manager

Kelly Troy
Client Service Manager

Data Entry & Migration Services

Veronica Bergey
Sr. Data Entry & Migration Specialist

Stephen Sharp
Manager, Data Entry & Migration Services

Shawn Steck
Sr. Data Entry & Migration Specialist

Brittany Loro
Sr. Data Entry & Migration Specialist

Antonio White
Sr. Data Entry & Migration Specialist

eLearning

Kate Hynson
eLearning Specialist

Diane Kelly
Sr. Technical Writer

Ryan Klinges
Advisory eLearning Specialist

Jacob Carwile
Manager, eLearning

Mikaela Rhoads
eLearning Specialist

Call Center Operations

John Vanderipe
Manager, Workforce Management

Mike Clark
Manager, Training & Development

Erica Flesch
Workforce Analyst

Bill Alberico
Senior Workforce Analyst

Patrick McMahon
Senior Workforce Analyst

Amy Makdisi
Supervisor, Client Support Training

Dave Newhard
Supervisor, Client Support Training & Content Management

Dan Mer
Sr. Instructional Designer

Client Support Supervisors

Jamie Berridge
Manager, Client Support

Emmett Devlin
Supervisor, Client Support

Patty Piergiovanni
Supervisor, Client Support

Rio Moore
Supervisor, Client Support

Taylor Piwonski
Supervisor, Client Support

Eric Wozniak
Supervisor, Client Support

Client Support

Tralonda Baber
Assoc. Client Support Specialist

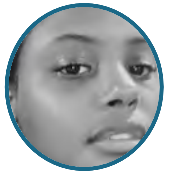
Jason Huang
Assoc. Client Support Specialist

Connie O'Neal
Client Support Specialist

Lydia Corcoran
Client Support Specialist

Gregory Davis
Sr. Client Support Specialist

Howard Bradley
Client Support Specialist



Alexa-Cymone Collins-Davenport
Assoc. Client Support Specialist

Jorge Santos
Client Support Specialist

Jessica Reames
Assoc. Client Support Specialist

Kevin Mitchell
Client Support Specialist

Nicole Rocha Luguesi
Assoc. Client Support Specialist

Rachael Shanshala
Assoc. Client Support Specialist

Christopher Conca
Client Support Specialist

Jared Sowell
Client Support Specialist

Michael Dean
Client Support Specialist

Richard Rathjen
Client Support Specialist

Andrew Harris
Client Support Specialist

Mariah Hoskins
Assoc. Client Support Specialist

Breanna Gutierrez
Client Support Specialist

Alexander Rose
Sr. Client Support Specialist

Jimmy Arellano
Client Support Specialist

Ryan Potako
Client Support Specialist

Zachary Benton
Client Support Specialist

Mark Scuderi
Client Support Specialist

Client Support

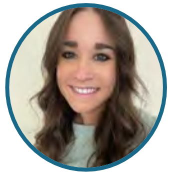
Rob Beachley
Client Support Specialist

Beth Weinstein
Sr. Client Support Specialist

Michael Wolfgang
Client Support Specialist

Erin Caracino
Client Support Specialist

Brian Hughes
Sr. Client Support Specialist



Olivia Crays
Client Support Specialist

Amanda Burkart
Client Support Specialist

Michael Fitzgerald
Client Support Specialist

Christien Starks
Client Support Specialist

Lucas Flavin
Sr. Client Support Specialist

Daniel Carle
Client Support Specialist

Derrick Sumabat
Client Support Specialist

Oksana Kaleeva
Client Support Specialist

Brandon Perez
Client Support Specialist

Chris Hopkinson
Client Support Specialist

Kristina Radom
Assoc. Client Support Specialist

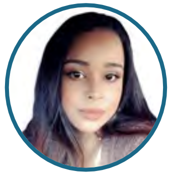
Justin Plansky
Assoc. Client Support Specialist

Toni Reber
Client Support Specialist

Jonathan Zynn
Client Support Specialist

Saheli Banerjee
Client Support Specialist

Patrick Mealy
Client Support Specialist



Nancy Mendoza
Assoc. Client Support Specialist

Lisa Brassell
Sr. Client Support Specialist

Caitlynn Bowers
Sr. Client Support Specialist

Victor Johnson
Client Support Specialist

Jessica Marciniak
Client Support Specialist

Client Support: Helpdesk Product Support

Julia Capatch
Helpdesk Product Support Specialist

Ryan McIntyre
Helpdesk Product Support Specialist

Scott Hyland
Helpdesk Product Support Specialist

Dean Parker
Helpdesk Product Support Specialist

Technical Support

Brett Billingsley
Manager, Technical Support

Nicholas Houston
Supervisor, Technical Support Engineers

Rose Adlam
Supervisor, Technical Support

Ryan Stramara
Data Support Analyst I

Jessica Pipher
Data Support Analyst II

Brian Sloss
Data Support Analyst I

Akli Sari
Data Support Analyst I

Margaret Whitmus
Data Support Analyst I

Michael Franta
Data Support Analyst I

Linda Sang
Data Support Analyst I

Ryan Adam
Technical Support Engineer

Kevin Clark
Technical Support Engineer

Chiberu Egandu
Technical Support Engineer

Ryan Fransen-Pruden
Technical Support Engineer

Ryan Potako
Sr. Technical Support Engineer

Ryan Kelly
Sr. Technical Support Engineer

Charles Boldes
Technical Data Analyst

Shawn Gallen
Technical Data Analyst

Myles Pauletich
Technical Data Analyst

Lauren Sampson
Technical Data Analyst

Nicholas Pipher
Technical Data Analyst

Bill Woodruff
Technical Data Analyst

Relationship Management

Nicole Prestileo
Advisory Relationship Manager

Sean Gallagher
Relationship Manager

Lisamarie Roberto
Sr. Relationship Manager

Rachel Davidson
Sr. Relationship Manager

Melinda Etheridge
Relationship Manager