



Town Hall

April 30, 2025



eMoney

| Welcome



Susan McKenna
CEO

Agenda

1. Welcome
2. Q1 2025 Business Update
 - Sales & Finance
3. 25th Anniversary Campaign and Summit Preview
4. Employee Engagement Survey Details
5. Employee Engagement Committee (EEC) Update
6. Questions



Awards and Recognition

2025 Wins So Far...



2025 Fintech Breakthrough Awards

Wealth Management
Innovation Award

My Plan



2025 Stevie Awards for Sales and Customer Service

Back-Office Customer
Support Professional
of the Year
Kate Hynson (gold)

Customer Service
Training Professional
of the Year
Ania Iguitian (silver)

Front-Line Customer
Service Professional
of the Year
Veronica Bergey (bronze)



| Sales Update



Christian Solomine
Head of Sales

Q1 2025 Sales Update

Q1 2025 ADVISOR SALES	
Wins	2038
Avg. Selling Price	\$2,944
ARR (\$M)	\$6,000,037
% to Quota	104%

Q1 2025 ENTERPRISE SALES	
ENT Deals	31
ARR (\$M)	\$705,295
% to Quota	80%

Q1 STRATEGIC ENTERPRISE WINS
Mass Mutual Renewal - \$124K
Lincoln National Life - \$108K
Lexington Financial Lift - \$70K
Indivisible Partners - \$50K
Beacon Pointe - \$44K
The Mather Group - \$24K

Q1 STRATEGIC ADVISOR WINS
Jim Corbett Premier Upgrade - \$15.7K
Las Aguilas Services LLC - \$12.9K
Bank of Ann Arbor - \$12K
Invested Advisors - \$10.3K
Steward Partners - \$9.7K
Blue Investment Partners - \$7.3K

Q1 SDR HIGHLIGHTS
Booked 1728 meetings in Q1 • 120% vs 2024
Created \$4.8M in pipeline in Q1 • 116% vs 2024
Created \$2.8M in closed ARR in Q1 • 138% vs 2024

Finance Update



Eric Kerble
VP, Financial
Planning & Analysis

Annual Recurring Revenue

(m's)	Q1 2025 Results	Q1 2025 Budget	2025 FY Budget
eMoney			
New ARR	\$7.4M	\$5.7M	\$24.7M
Churn	(\$3.8M)	(\$4.9M)	(\$16.2M)
Net New ARR	\$3.6M	\$0.9M	\$8.4M
Net New Fidelity Full-view	\$0	\$0	\$0
Net New ARR Total	\$3.6M	\$0.9M	\$8.4M

Financial Results

	Q1 2025 Results	Q1 2025 Budget	FY Budget
Revenue	\$40.3M	\$40.0M	\$164.3M
Expense	\$38.8M	\$39.4M	\$155.3M
Earnings	\$1.5M	\$0.6M	\$9.0M

25th Anniversary and Summit



Rachel Eccles
Head of Marketing

Brand Anniversary Campaign

eMoney turns 25 in June 2025!

Why should we celebrate?

- Reinforce brand values
- Strengthen trust and loyalty with stakeholders
- Shift/enhance the narrative as a legacy fintech brand
- Seize the opportunity to have fun

The logo for eMoneyAdvisor, featuring a small green triangle to the left of the word "eMoney" in purple and "Advisor" in green.The logo for Money ADVISOR, featuring a stylized green and black triangle to the left of the word "Money" in black, with "A D V I S O R" in small black letters below it.The logo for eBlog emX, featuring the word "eBlog" in black with a blue globe icon for the "o", and "emX" in blue below it.The logo for eMoney Advisor, featuring the word "eMoney" in a large, bold, italicized black font, with "Advisor" in a smaller, italicized black font below it.

Brand Anniversary Campaign Strategy and Goals

Develop multi-channel marketing and communications campaign that leverages:

Compelling storytelling and creative assets to capture eMoney's past, present, and future and highlight 25 years as a fintech leader

Goals

- Brand awareness
- Client engagement and advocacy
- Employee engagement and recognition
- Media coverage and social engagement

Target Audiences

- Clients and partners
 - Employees
 - Prospects
 - Industry (press/public)
-

Channels

- Social
- Client Email
- Web
- Internal Comms
- PR/Media Relations
- Events

Deliverables

- Video
- Landing page
- Company timeline
- Podcast episodes
- Client Case Study
- Employee profiles
- Social snapshots
- Sales promo (July)
- And more!

Campaign and Summit Theme



eMoney



Throughout 25 years of countless changes – in our industry, in our society, and in our world – eMoney has always been one step ahead, anticipating, developing, and delivering financial planning solutions that make an impact.

Today, we remain committed to providing the industry's best technology to ensure financial professionals can build strong relationships, strong businesses, and even stronger financial plans. Together, we will continue to shape the future of financial planning by delivering effective and thoughtful experiences for our users and their clients.

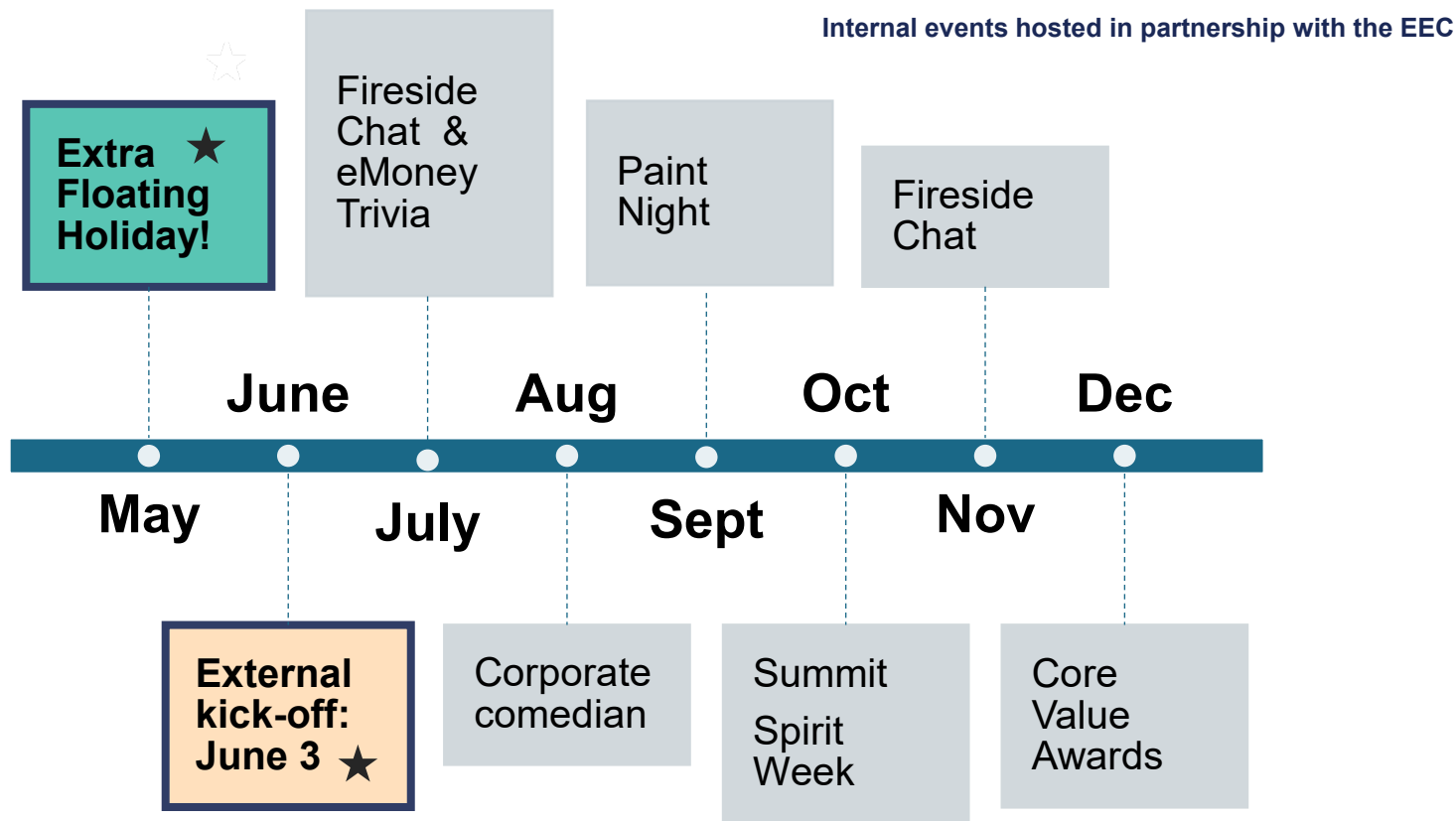
Branding Examples



**Tomorrow's
Planning,
Today.**



Tentative Timeline

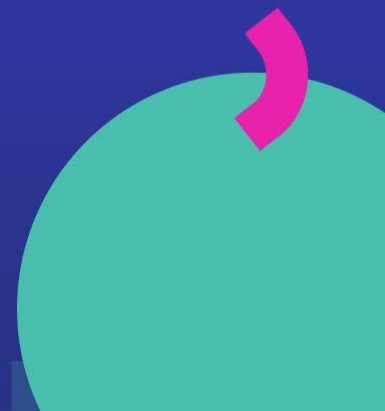




Registration is open!

October 20-22, 2025

#eMoneySummit25



25 Years Strong Building Our Future Together



Pam Henry
Director Employee
Success



Did You Know?

Collaboration and Communication



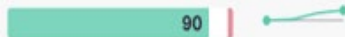
Product Strategy & Vision
shared at bi-annual town
halls and departmental
all-hands; progress is
tracked, and feedback is
incorporated into the story.

Did You Know?

Development & Architecture now prioritize career growth, holding bi-annual discussions that have already sparked internal moves and new opportunities.

Learning and Development

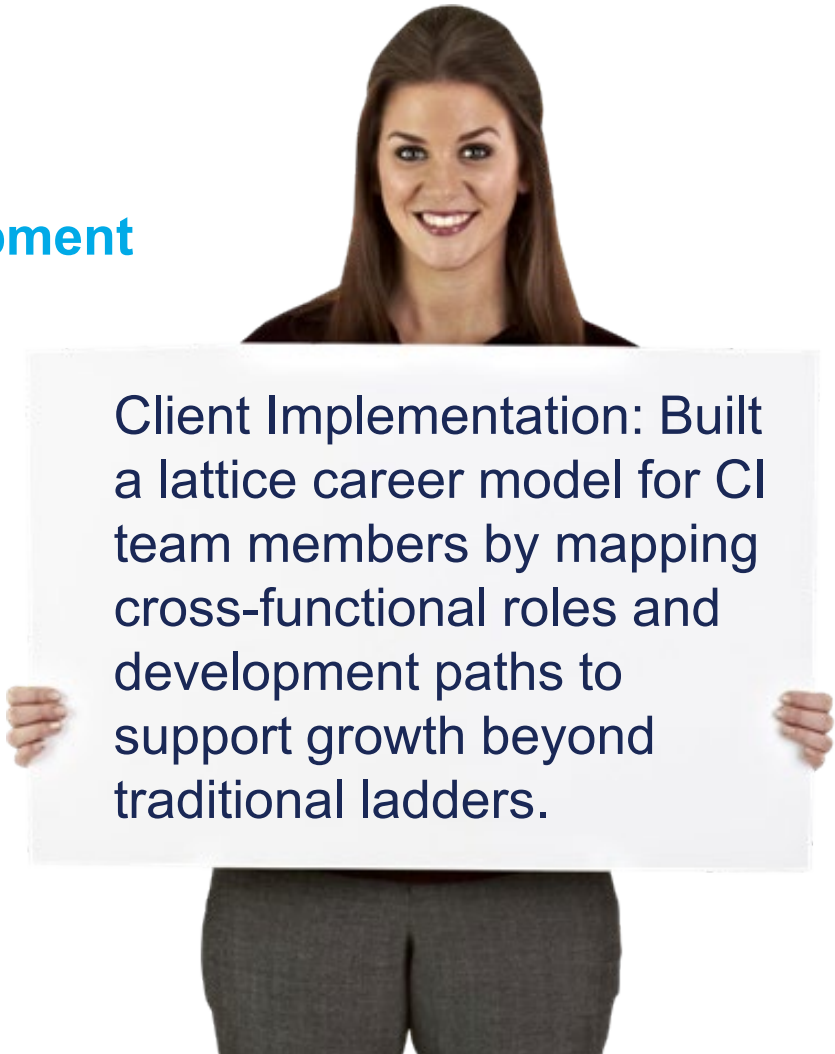
"My manager (or someone in management) has shown a genuine interest in my career aspirations"





Did You Know?

Learning and Development



Client Implementation: Built a lattice career model for CI team members by mapping cross-functional roles and development paths to support growth beyond traditional ladders.

Employee Engagement Survey

“25 Years Strong - Building Our Culture Together”

May 5: Survey Opens!

- Invitation email sent to employees via Culture Amp
- Private survey link (Don't share with anyone!)
- Employees hired after March 6 will not receive a survey

May 16: Survey Closes

June 2: Managers Receive their Report

- Leaders will meet with teams to share results
- Business unit/department action planning will begin

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

MAY

JUNE

Employee Engagement Survey

“25 Years Strong – Building our Culture Together”

Our Leaders Section  Core Leadership Team (CLT)

Your Managers Section  Your Direct Manager

More feedback? Comments can be added to any question

EEEC Updates



Mike O'Callaghan
Director, Talent Strategy



Q1 and Q2 EEC Updates

1. New point system
2. Last day for Charitable Giving 2-for-1
3. March Madness winners
4. Wellness challenge progress
5. New element to Random Coffee

| Questions