2025 eMoney Summit News Summary

2025 Company Performance Highlights

- More than **138,000 financial professionals** across firms of all sizes use the eMoney platform to serve more than **7 million households** throughout the U.S.

- **25 new features and enhancements launched**, including the Premium Client Portal and **eight new integrations**.

- **300 new data aggregation sources and connections** added, expanding access and reliability.

- **26,000 new users** joined the eMoney platform, underscoring advisor trust and adoption.

- Achieved a **96% client satisfaction score** for customer service and support.

Expert Insights

- This year's Summit theme, "Tomorrow's Planning, Today," was inspired by **25 years of ambition, innovation and collaboration**, working with advisors to shape the future of financial planning.

- To dive deeper into this theme, eMoney conducted **nearly 20 interviews with industry experts** about the evolution of financial planning.

- Their findings and insights are woven throughout panel discussions, breakout sessions, and additional presentations.

- Click here to view the "*The Next Era in Financial Planning*" research report, which will be made available in the Summit platform for all attendees.

Product Announcements

2025: Released

- **Needs Analysis (March):** Enhanced version is built for fast, topical planning on individual goals like retirement, education and life insurance, guiding advisors from data gathering to analysis with embedded solver intelligence to help explore options. Additional topics such as long-term care, annuity income, and debt paydown are expected later this year.

- **Premium Client Portal (April):** Enhanced version of eMoney's industry-leading Client Portal features additional tools that enhance engagement, strengthen relationships, and drive business growth, such as a mobile app, a new Explore page, and personalized homepages.

  Plan Explorer (July): Allows end-clients to create multiple scenarios and explore how different decisions could shape their future without affecting their financial plan, fostering deeper understanding and collaboration between the advisor and client.

  Onboarding Workflow (Sept.): Modern, mobile-optimized portal experience for faster, easier client data entry.

- **New Integrations:** Added integrations with Tolerisk, YCharts, Vanilla, Wealth.com, Luminary, Zocks, Jump AI, and Black Diamond.

2025: Coming Soon

- **Developer Site:** Launching Oct. 28, a new developer website will serve as a centralized hub where partners and developers can easily access APIs, components, integration documentation, use cases, and best practices.

- **Integrations:** Integrations including Asset Map and FP Alpha are planned for Q4 with more coming next year.

2026: Feature Enhancements

- **Foundational Planning:** An enhanced version of Foundational Planning will deliver a single, streamlined workflow that is faster, easier to use and more personalized for every client through one intuitive experience. Presentation View and the My Plan page in Decision Center will be available within the tool.

- **Goal Planner:** A fully updated version will make it easier to create, explore and compare multiple planning strategies in real time. The enhanced Goal Planner will be fully integrated into Decision Center, enabling advisors to seamlessly move in and out of the tool amid client conversation.

2026: New Capabilities

- **eMoney CoPlanner:** Currently in beta testing with over 1,000 advisors, this tool intelligently analyzes a client's full financial picture and suggests strategies tailored to their specific goals. Fast, compliant and designed to support an advisor's process, it is already delivering real results with advisors who have reported an average of 48% time savings.

- **Business Intelligence:** To help unlock the full potential of the data generated in the planning process, eMoney is developing new ways for advisors to uncover high-impact planning and engagement opportunities all from a single dashboard.
    - Learn more about our framework for what we're calling "eMoney Intelligence."

- **Standalone Data Gathering:** Advisors will be able to send the onboarding flow as a standalone experience, focused solely on gathering client data. This provides advisors with more control over how and when clients engage, while still capturing key information to keep planning moving forward.

- **Prospecting Tools:** There will be new ways to leverage the portal for prospecting, helping advisors connect with potential clients earlier in the planning process.

- **Aggregation:** eMoney will launch a new machine learning-powered Account Type categorization engine. Payroll data aggregation and real-time connection alerts are also planned.