# Town Hall

April 22, 2026

# Agenda

1. Q1 2026 Business Results
   - Sales and Finance
   - Pricing and Packaging Initiative
2. Q1 Product Release Highlights
3. Summit Preview
4. Employee Engagement Pulse Survey
5. People Experience System Updates
6. Questions

# Industry Awards and Recognition



**Fintech Breakthrough Awards**

Wealth Management Product of the Year

*Premium Client Portal*

## Stevie Awards for Sales & Customer Service

### *Gold Winners*

Back-Office Customer Service Professional of the Year
*Myles Pauletich*

Customer Service Training Professional of the Year
*Brett Tharp*

Customer Service AI Trainer of the Year
*Diane Kelly*

### *Silver Winners*

Back-Office Customer Service Professional of the Year
*Oksana Kaleeva*

Customer Service Training Professional of the Year
*Ania Iguitian*

Customer Service Manager of the Year
*Roseida Cotto*

### *Bronze Winners*

Front-Line Customer Service Professional of the Year
*Andrew Harris*

Achievement in Customer Service Automation
*IVA & Chatbot Implementation Teams*

# Industry Awards and Recognition



## T3 Inside Information Software Survey

***Ranked # 1 in***

| | |
|---|---|
| Financial Planning Software | Estate Planning Tools |
| Education Planning Tools | Account Aggregation Tools |

# Q1 2026 Business Results

eMoney



# Sales

**Christian Solomine**
Head of Sales

# Q1 2026 Advisor Sales Results



| Advisor Sales | |
|---|---|
| **Wins** | **2470** |
| **Avg. Selling Price** | **$2,829** |
| **ARR ($M)** | **$7.0** |
| **% to Quota** | **107%** |

| Strategic Advisor Wins |
|---|
| Bridlewood Private Wealth (Basic API's) – $24.6K |
| 4P Wealth Trust (New Logo) – $6.2K |
| Cercano Management (New Logo) – $20.8K |
| Delos Capital Advisors (Upsell) – $8K |
| Kintra Wealth (Upsell) – $11.7K |
| American Wealth Management (New Logo) – $9.2K |

| SDR Highlights |
|---|
| Booked **2,101** (121% vs. Q1 2025) |
| Created **$6.2M** in pipeline (129% vs. Q1 2025) |
| Created **$3.7M** in closed ARR (132% vs. Q1 2025) |
| **60% Win Rate** |

# Q1 2026 Enterprise Sales Results



| Enterprise Sales | |
|---|---|
| **Enterprise Deals** | **58** |
| **ARR ($M)** | **$2.76M** |
| **% to Quota** | **406%** |

| Strategic Enterprise Wins |
|---|
| Mass Mutual Life (Renewal) – $995K |
| Sequoia Financial Group (API's-MGP Rip out) – $260K |
| Mercer Global Advisor (AGG & API's) – $129K |
| Dynasty Financial Par (Expand) – $85K |
| 1919 (Ent Planning) – $70K |
| Pruco Securities (New Users) – $75K |

# Finance

**Fred Patin**
Head of Finance

# Annual Recurring Revenue (ARR)*

| | Q1 2026 Results | Q1 2026 Budget | 2026 FY Budget |
|---|---|---|---|
| eMoney | | | |
| Additions to ARR | $9.3M | $6.0M | $30.4M |
| Reductions to ARR | ($5.4M) | ($6.1M) | ($17.9M) |
| **Net New ARR** | **$3.8M** | **($0.1M)** | **$12.6M** |

**ARR reporting excludes the FullView Business*

# Financial Results



| | Q1 2026 Results | Q1 2026 Budget | 2026 FY Budget |
|---|---|---|---|
| Revenue | $43.7M | $42.7M | $176.7M |
| Expense | $39.5M | $41.0M | $159.8M |
| **Earnings** | **$4.2M** | **$1.8M** | **$16.9M** |

# Pricing and Packaging Initiative

# Packaging and Pricing Initiative

## A companywide execution win!



### Packaging Update

- Systems updated with new packages and new functionality
- Premium Client Portal now included in Premier package
- Updated corporate website, marketing and sales materials, and operational systems
- Tight collaboration between Billing and Order Operations, Marketing, and Sales teams.

### Price Increase

- Enablement of price increase for new clients
- Applying a $300 price increase for all renewing clients (modern + legacy)
- Operational systems updated, client-facing teams ready to address the value story

# Q1 Product Release Highlights

Nick DiLisi
Head of Technology

# Celebrating Our Q1 Releases

We’ve delivered several major launches that strengthen our platform, clarify our value, and modernize the eMoney brand.

- Updated our **Product Packages**
- Launched **CoPlanner**
- Released **New Foundational Planning**
- Added **Enhanced Branding** capabilities to Premium Client Portal
- Rolled out **Okta Adaptive Multi-Factor Authentication** (MFA)

# Market Reaction

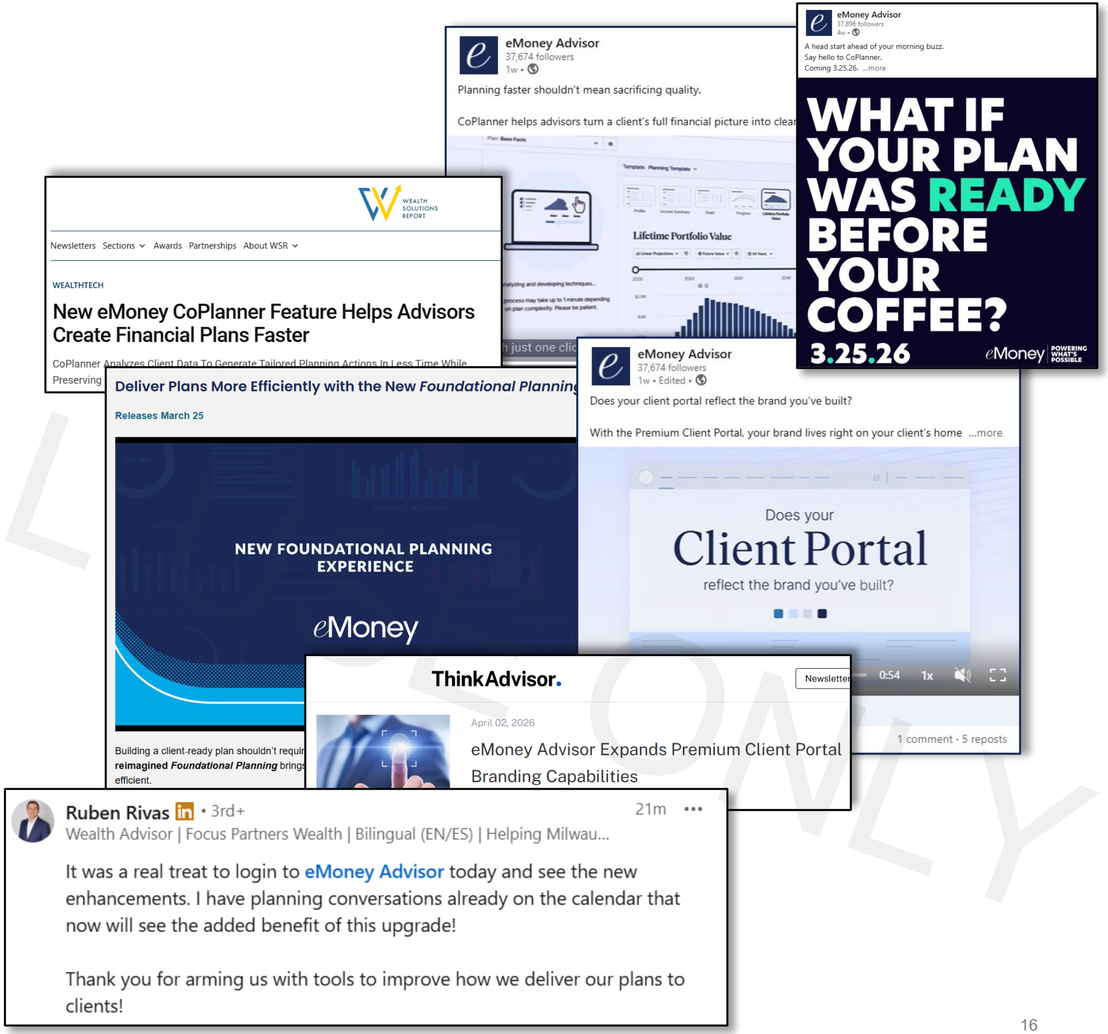


## Social Engagement

- **125** total posts
- **54K+** impressions
- **8.2%** engagement rate – *exceeding* LinkedIn's benchmark of 6%!

## Media Mentions

- **Notable pickup** by:
  - InvestmentNews
  - ThinkAdvisor
  - WealthManagement
  - Wealth Solutions Report



# PREVIEW: Early Adoption and Usage Metrics

**5,200**

Advisors used CoPlanner in the first week.

CoPlanner saving advisors

**3,600+**

hours of potential manual work

**710**

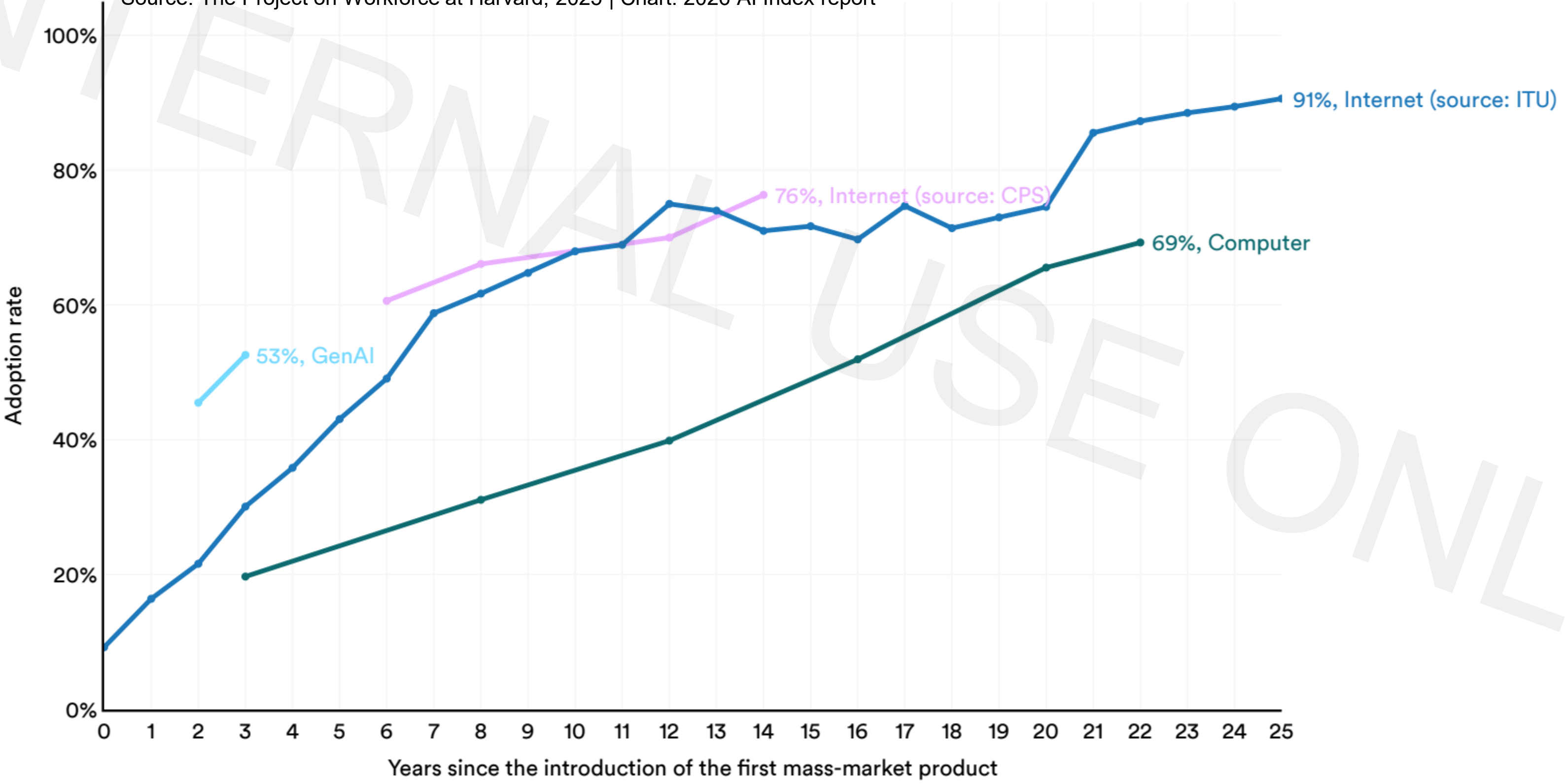
Premium Client Portal users applied Enhanced Branding.

Join the Product Roadmap and Vision session on Wednesday, May 27 (10 – 11:30 a.m. ET) for a deeper dive!

# Speed of AI Adoption by Technology

Generative AI reached 53% adoption in three years, faster than the personal computer or the internet.

Source: The Project on Workforce at Harvard, 2025 | Chart: 2026 AI Index report



# Leveraging AI to Protect and Grow the Business

We're assessing how the use of AI can improve our product, transform our process, and protect and grow our business.



## Our perspective:

Examining ways to apply AI in our business:

- To accelerate innovation
- Transform how we operate
- Improve advisor value
- Strengthen platform defensibility
- Extend market leadership

## We believe it'll lead to:

- Human compliance and oversight becoming more important
- Better platform adoption
- Faster delivery cycles
- Reinforcement of eMoney as a market leader

## For our product:

AI can reduce cognitive friction and manual effort in every stage of the planning lifecycle, while increasing advisor productivity, confidence, and speed.

## Our principles:

We prioritize AI that drives real outcomes:

- Save measurable time
- Increase plan quality and personalization
- Improve client understanding
- Expand advisor capacity
- Product opportunities to sell and grow

## How we work:

We're evaluating how the adoption of AI-first tools can reshape the way we work to:

- Deliver more value faster
- Maintain higher quality products and services
- Reduce costs through AI-assisted automations
- Increase overall profitability
- Maintain competitive advantage

## What we're doing now:

Assembled a small team operating outside our traditional agile process and tech stack to test AI-first tools over a two-week period to evaluate:

- Speed gains and efficiencies
- User impact/value delivered
- Code quality, security, reliability
- Impacts on processes, roles, skill sets
- Applicability across other departments

eMoney

# SUMMIT PREVIEW

**Jennifer Owens**
Manager, Events

# SUMMIT GOALS AND EVENT HIGHLIGHTS

Summit is our annual flagship event that is designed to help advisors get more out of eMoney – whether they're just getting started or looking to take their expertise to the next level. From product insights to hands-on training, it's all about driving adoption, deeper engagement, and real impact for their business.

**Date: October 19-21**

**Location: Virtual**

**Attendance Goal: 1,350 Registrants**

# STRATEGIC PURPOSE

Summit is designed to strengthen client relationships, accelerate revenue opportunities, showcase innovation, and build the trust that drives long-term growth.

## Retention

- Deepen Relationships
- Exclusive Roadmap Preview
- Personalized Training

## Revenue

- Registrations
- Sponsorships
- Upsell

## Brand

- Thought Leadership
- Media Placements
- Social Engagement

# STRATEGIC PRIORITIES FOR 2026

## 01
### Experience

- BigMarker platform (3rd year!)
- eMoney Experience
  - Interactive Product experience
- Exhibit Hall
- Network Lounge
  - Live Q&A
- Help Desk
- Gamification and Prizes

## 02
### Agenda

- Mainstage
- Panels
- Keynote(s)
- Home Office
- Breakout Sessions
- CE Credits

## 03
### Coaching

- BigMarker platform (2nd year!)
  - Registration page
  - Self-select scheduling
  - Auto-response email
  - “Add to calendar” feature

Powering What's Possible

Financial advisors play a powerful role in helping clients move forward with clarity and confidence, whether their clients are just getting started, navigating life's changes, or planning for long-term security. Through thoughtful, trust-building collaborative planning, advisors guide better decisions and stronger financial outcomes. Advisors are essential, and by empowering them with solutions that reduce complexity, strengthen relationships, and expand access to advice, eMoney enables them to focus on what matters most: helping their clients plan for a secure financial future.

# DESIGN ELEMENTS



## Colors

## Photography

## Graphical Elements

## Fonts

New Hero Super

Aa Bb Cc Dd Ee Ff Gg
Hh Ii Jj Kk Ll Mm Nn Oo
Pp Qq Rr Ss Tt Uu Vv
Ww Xx Yy Zz
0123456789

Lexend

Aa Bb Cc Dd Ee Ff Gg
Hh Ii Jj Kk Ll Mm Nn
Oo Pp Qq Rr Ss Tt Uu
Vv Ww Xx Yy Zz
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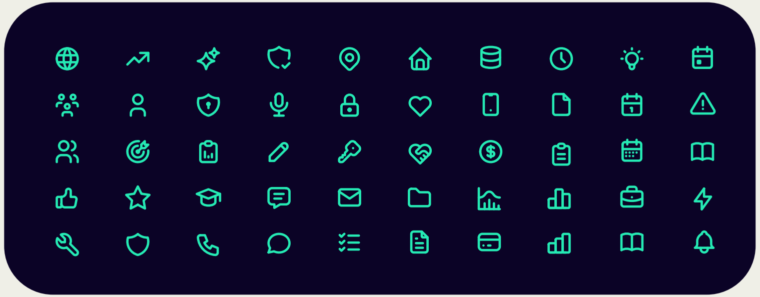
## Icons



## Email Signature

# TIMELINE

**May 12th**

Registration Opens

**June 26th**

Early Bird Ends

**June 16th**

Agenda Preview

**July 13th**

Summer Pricing

**July 23rd**

1:1 Coaching Opens

**September 22nd**

Summer Pricing Ends

**October 19th**

Summit Opens

**October 21st**

Summit Closes

# STAY CONNECTED



**Jennifer Owens**
Manager, Events
Jowens@emoneyadvisor.com

## Stay up-to-date!

Corporate Website: www.emoneyadvisor.com/Summit

Life@eMoney Intranet

## Questions/Ideas?

AdvisorSummit@emoneyadvisor.com

eMoney



# Building Our Culture Together – Pulse Survey

**Joanne Del Signore**
Head of People Experience

# Building Our Culture Together - Pulse Survey

**Your voice drives real change. Take the Pulse Survey.**

Survey Opens: **May 4** → Survey Closes: **May 15**

**Confidential? Absolutely!**

- The survey is administered by **Culture Amp** a secure external website. No one at eMoney can see individual responses.
- This allows for candid feedback that helps us know what's working and what to improve. Neutral responses make it harder to know what to fix!

**Time for Action**

- **June**: Leaders review results with their teams to create or update action plans.
- **August:** Companywide results shared during Town Hall

## Real Results

**You said:** Meetings felt less effective.

**What we did:** Created the Meeting & Communication Best Practices Hub with emphasis on clear agendas, fewer unnecessary meetings, cameras on!

**Now:** Tell us what's been better in meetings and what still needs work!

# Planned System Updates

**Joanne Del Signore**
Head of People Experience

# Upgraded Experience for Learning and Performance (DIG)



### Why is DIG changing?

- To make performance and development **simpler, clearer, and more useful**.
- What we do isn't changing – how we do it will be easier!

### What to expect

- An **updated look and feel** – featuring a more intuitive, streamlined experience that makes it easier to navigate and take action.
- Updates will be **completed by Mid-Year Reviews**, which begin June 1.
- **Training** will be provided ahead of Mid-Year Reviews on June 2 and 3.

### What you'll need to do

- Ensure **goals are finalized or updated** in the current system by May 15.
- **Attend live training** and/or review training materials.

# Our New Applicant Tracking System (Greenhouse)



### Why we're changing

- We need a system with greater functionality that can strengthen and streamline our hiring process.

### What this means for the business

- More structured and data-driven hiring decisions
- Improved quality, consistency, and inclusivity
- Better insights into what drives successful hires

### What this means for you

- More structured and data driven hiring decisions
- Clearer interview expectations and planning
- Improved hiring accuracy that strengthens teams and collaboration

### What's next

- Phased rollout with manager training and resources in June