

Wealth Management Technology That Helps You *Build Colla*



SEE HOW



LEARN MORE

Your deep-rooted expertise. Our innovative wealth management and financial planning software. One unwavering dedication to helping you and your clients succeed.



FOR INDEPENDENT PRACTITIONERS

An agile wealth planning platform that grows with your needs.

LEARN MORE

Invest in a technology partner with the experience to help you transform the way you deliver scalable advice and build collaborative client relationships.



REVENUE SHIPS²

REVENUE

Step
up
Step

Step

Thinking
Relationships

Step
Step

ADVICE

Step
Step

Step
Step

Step
Step

Step
Step

Step
Step

Step
Step

Step
Step

management
Should be
improves
with
the
platform
digitally.
have
keep
planning
today
ever.
tomorrow.

START
GET
GROWING

PUT
YOUR
PLAN IN
MOTION

TAKE
A
LOOK

START YOUR FREE TRIAL

Advisors Say Some Nice Things About Us

READ CASE STUDIES



"Thanks to eMoney, we get 5-7 phone calls a week from new people who have been referred to us, who have heard of us and who want me to be their financial advisor."

PATTI BRENNAN, *KEY FINANCIAL*



"This software has helped me scale my practice as we continue to add more clients and AUM."

KEVIN BAUER, *BCI CAPITAL MANAGEMENT*



FROM THE BLOG

Case Study: Building a \$1.1B Financial Planning Services Firm

How a service-minded attitude and eMoney's scalable financial planning software has propelled this firm succeed.





RESOURCES

Meet Clients' Financial Planning Needs

Learn how to maximize the effectiveness of your advice to serve your clients' needs.



NEWS

eMoney Wins Fintech Breakthrough Awards

eMoney selected as the “Best Overall Fintech Software” in 2019 by FinTech Breakthrough Awards Program



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