

Wealth Management Technology That Helps You *Build Collabora*



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
FUNKING

SPACES

Thinking
Relationships

ahead
of
ADVICE

what
options
were

proven

technology

planning

and more

collaboration,

products

integrated
investment
needs

management
Should
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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Find Out Where We're Going Next

June 9 - 13 | AICPA Engage

June 12 - 14 | Pershing INSITE19

July 16 - 17 | In | Vest

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August 17 | WaterFire Providence

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