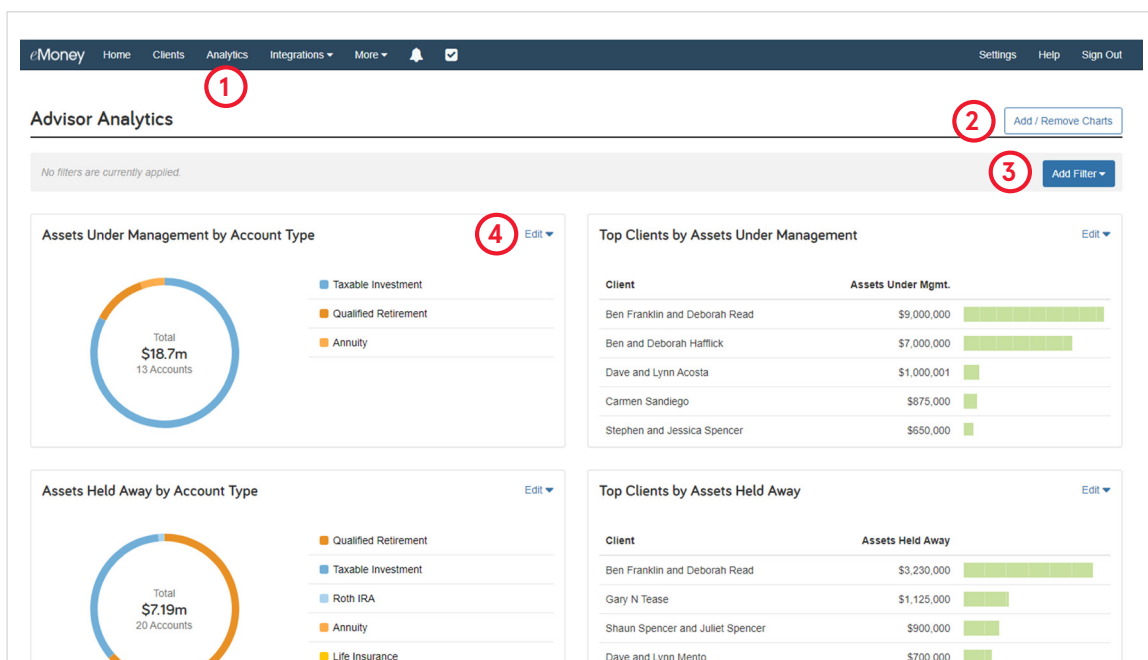


eMoney gives you the tools you need

eMoney's analytics can help you make better decisions that can influence the type of experience you offer to your clients, identify hidden opportunities, and ultimately grow your business.

Using advisor analytics



Step 1. From the eMoney landing page, click **Analytics** at the top of the screen.

To edit the results on screen:

Step 2. Select **Add/Remove Charts**.

Step 3. Click **Add Filters**.

Step 4. Select **Edit** individual charts.

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eMoney



JACKSON®

Add/remove charts

Add / Remove Charts

AllAssetsClientsComplianceHoldingsInsuranceLiabilitiesMarketingPlanning

Chart 1/2

Asset Status - Preview
The percentage of assets under management value compared to total assets value.
Remove

Assets Held Away by Account Type - Preview
The total value of assets held away broken down by account type.
Remove

Assets Held Away by Institution - Preview
The total value of assets held away broken down by institution.
Remove

Assets Under Management Over Time - Preview
A chart displaying the change in assets under management measured month-to-month over the past year.
2 + Add

Assets Under Management by Account Type - Preview
The total value of assets under management broken down by account type.
3 Remove

Assets Under Management by Institution - Preview
The total value of assets under management broken down by institution.
+ Add

1

Create customized charts for your dashboard.

Step 1. Select from a variety of categories.

Step 2. Click **Add** to see any of the charts on your dashboard.

Step 3. Click **Remove** and the chart will no longer appear on your dashboard.

Step 4. Click **Done** when finished.

Add filters

Add Filter ▾

Top Clients by Assets Under Management

Client	Assets Under Mgmt.
Ben Franklin and Deborah Read	\$9,000,000
Ben and Deborah Hafflick	\$7,000,000
Dave and Lynn Acosta	\$1,000,001
Carmen Sandiego	\$875,000
Stephen and Jessica Spencer	\$650,000

Account Connection Status

Account Sub-Type

Account Type

Account Value

Cash Balance

Client Age

Client Age Group

Client Child Age

Client Child Count

Client Group

You can filter your book of business by:

- Account type and account sub-type
- Account value
- Cash balance
- Client age or age group
- Client child age or count
- Client group
- Client name
- Client salary
- Cost basis
- Holding name/ticker symbol
- Holding value
- Institution
- Spouse salary
- State of residence

Recommended filters—filter by age

You can identify clients by age.

- Identify clients that are younger and could benefit from several years of tax-deferred growth.
- Find clients that are 5 to 7 years from retirement and might have a need for income.

Step 1. Click **Add Filter**.

Step 2. Select **Client Age**.

Step 3. From the pop-up menu, select **Greater Than Or Equal To**, **Less Than Or Equal To**, or **In Between**.

Step 4. Enter age(s).

Step 5. Click **Filter**.

The screenshot displays a financial software interface with a table of account values and a filter selection process. The table lists account values ranging from \$875,000 to \$9,000,000. A dropdown menu is open, showing various filter options, with 'Client Age' selected. A pop-up window titled 'Client Age' is shown, allowing the user to select a filter type ('In Between') and enter age values (55 and 70). The 'Filter' button is visible at the bottom of the pop-up.

Account Value	Filter Option
\$9,000,000	Account Connection Status
\$7,000,000	Account Sub-Type
\$1,000,001	Account Type
\$875,000	Account Value
	Cash Balance
	Client Age
	Client Age Group
	Client Child Age

Client Age Filter Pop-up:

Filter Type: In Between

Age 1: 55

And

Age 2: 70

Filter Button

Filter by account type

The screenshot shows a 'Filter by account type' dialog box. At the top, there is a blue button labeled 'Add Filter' with a downward arrow, marked with a red circle 1. Below this, the dialog has a title bar 'Account Type' with a close button (X) on the right, marked with a red circle 2. The main area contains a list of account types with checkboxes: 'Cash Alternative', 'Life Insurance', 'Medical Policy', 'Mortgage', 'Qualified Retirement', and 'Taxable Investment'. The 'Taxable Investment' checkbox is checked and marked with a red circle 3. At the bottom, there are two buttons: 'Include' and 'Exclude', with 'Exclude' being selected and marked with a red circle 4. To the right of these is a blue button labeled 'Filter', marked with a red circle 5.

You can identify client by account type.

- Identify clients that have taxable investments for tax-deferral opportunities.
- Find clients with large cash accounts that are sitting on the sidelines.
- Find clients with existing annuities.

Step 1. Click **Add Filter**.

Step 2. Select **Account Type**.

Step 3. From the pop-up menu, select an account type.

Step 4. Select **Include** or **Exclude**.

Step 5. Click **Filter**.

Filter by account value

1 Add Filter ▼

Account Connection Status

Account Sub-Type

Account Type

Account Value 2

Cash Balance

Client Age

Account Value

Greater Than Or Equal To 3

\$ 1,000,000 4

Filter 5

You can identify clients by account value.

- Identify high-net-worth clients that could benefit from additional tax deferral or have trust opportunities.

Step 1. Click **Add Filter**.

Step 2. Select **Account Value**.

Step 3. From the pop-up menu, select **Greater Than Or Equal To, Less Than Or Equal To, or In Between**.

Step 4. Enter value(s).

Step 5. Click **Filter**.

Filter by cash balance

1 Add Filter ▼

Account Connection Status

Account Sub-Type

Account Type

Account Value

Cash Balance 2

Client Age

Client Age Group

Cash Balance

Greater Than Or Equal To 3

\$ 1,000,000 4

Filter 5

You can identify clients with large cash balances.

Step 1. Click **Add Filter**.

Step 2. Select **Cash Balance**.

Step 3. From the pop-up menu, select **Greater Than Or Equal To, Less Than Or Equal To, or In Between**.

Step 4. Enter value(s).

Step 5. Click **Filter**.

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