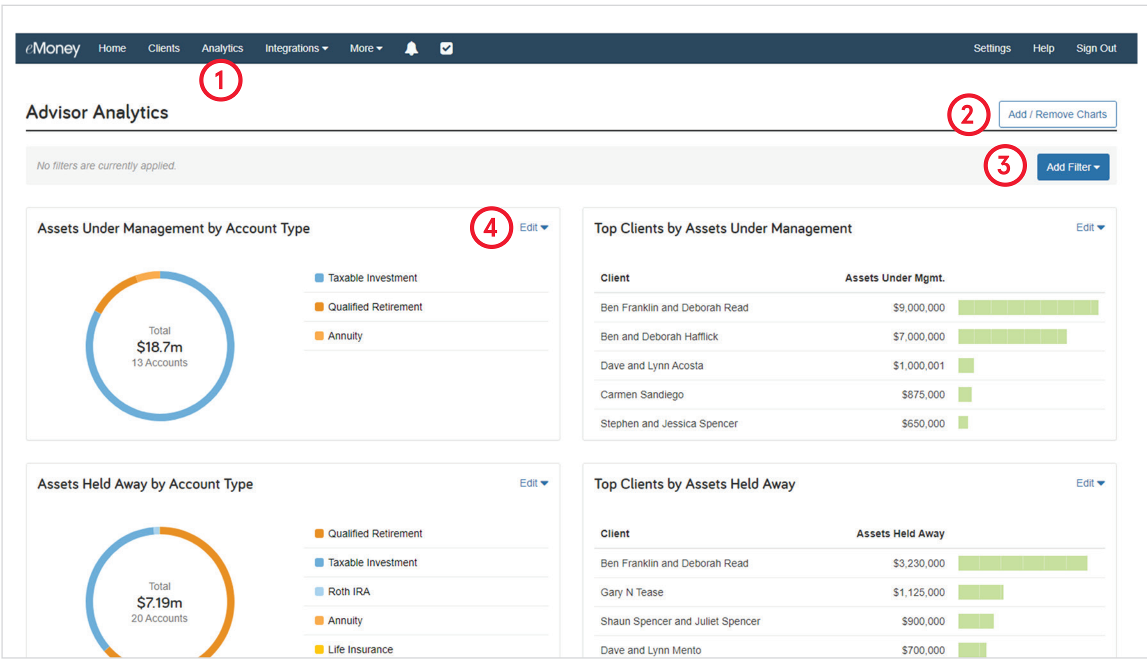
BOOK OF BUSINESS REVIEW USING ANALYTICS

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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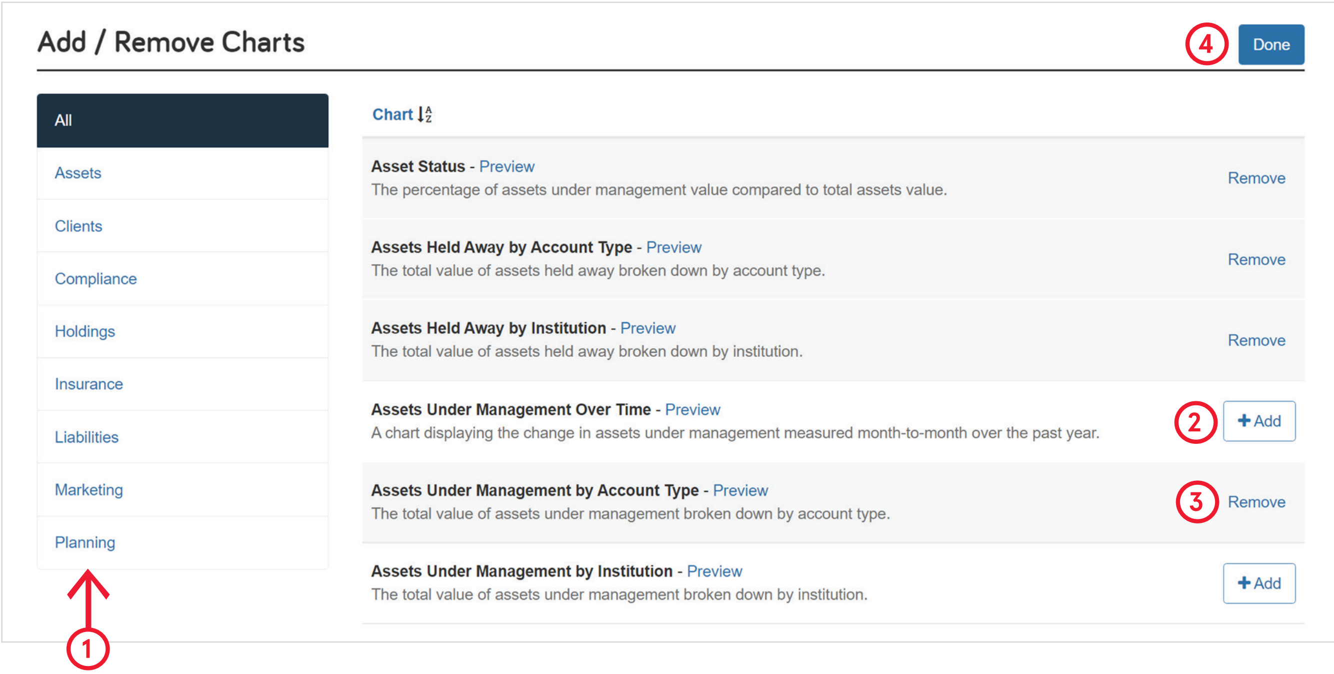
Add/remove charts



Create customized charts for your dashboard.

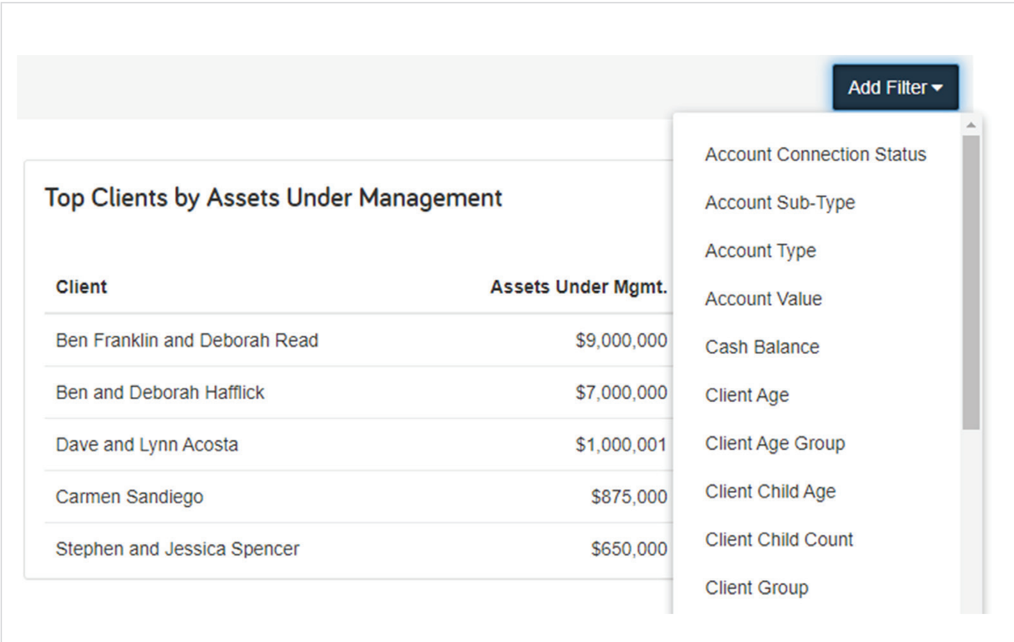
Step 1. Select from a variety of categories.

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.

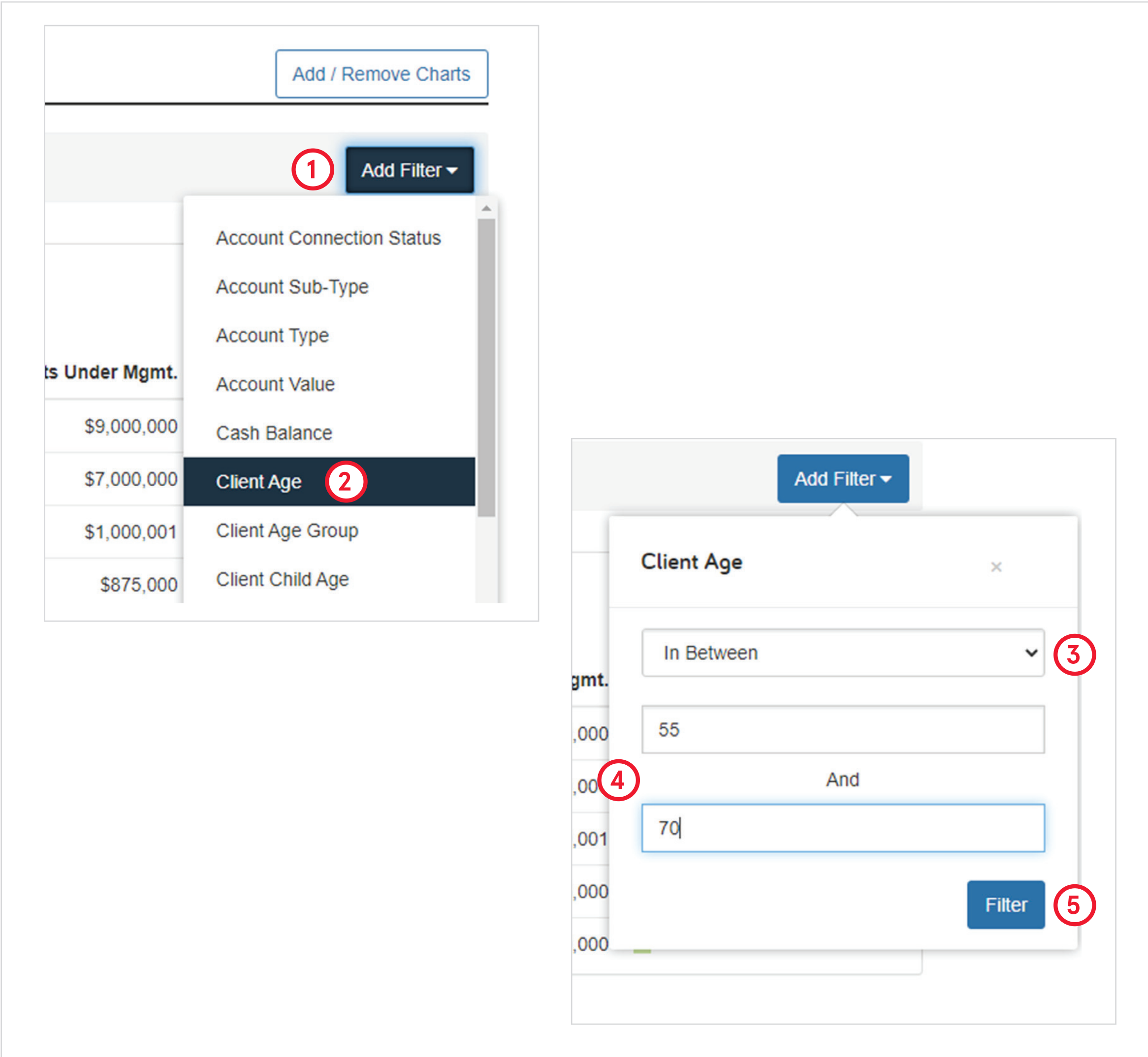
Add filters



You can filter your book of business by:

- Account type and account sub-type
- Account value
- Cash balance
- Client age or group
- Child count and age
- 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 may have a need for income.

Step 1. Click **Add Filter.**

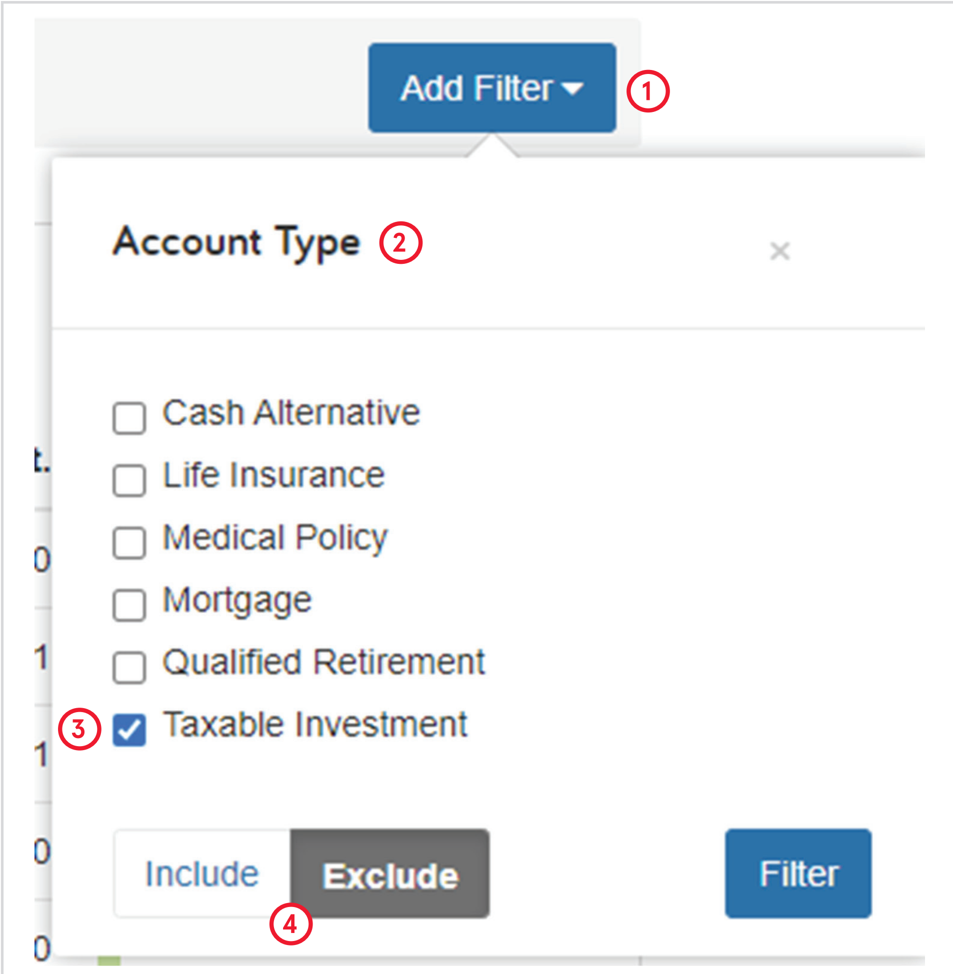
Step 2. Select **Client Age.**

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

Step 4. Enter age(s).

Step 5. Click **Filter.**

Filter by account type



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.

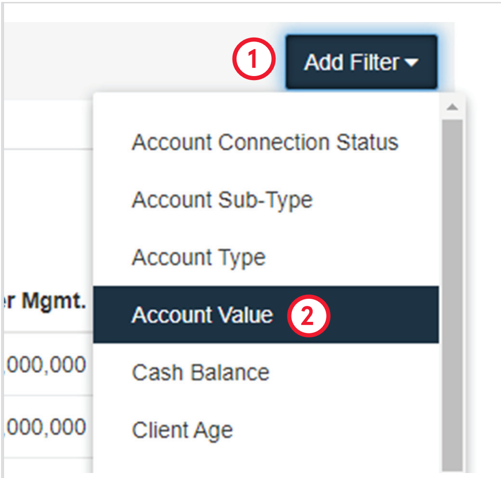
Step 1. Click **Add Filter.**

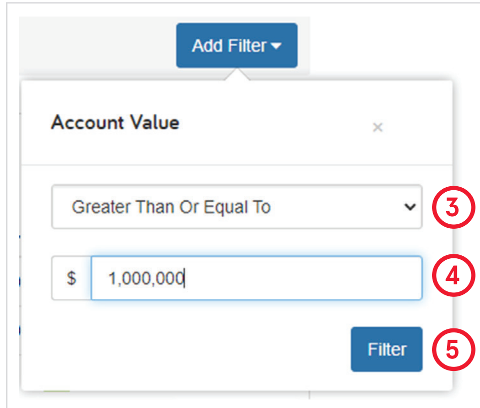
Step 2. Select **Account Type.**

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

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

Filter by account value





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.**

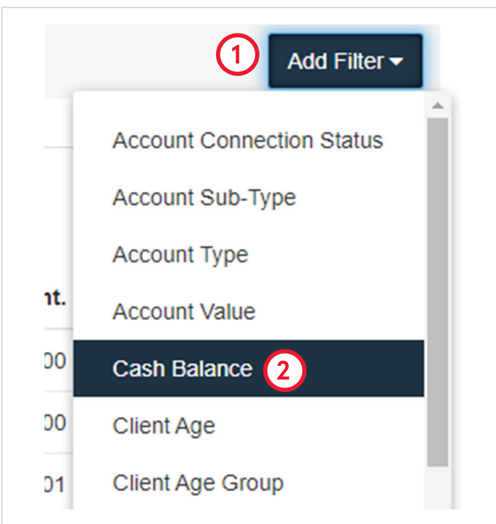
Step 2. Select **Account Value.**

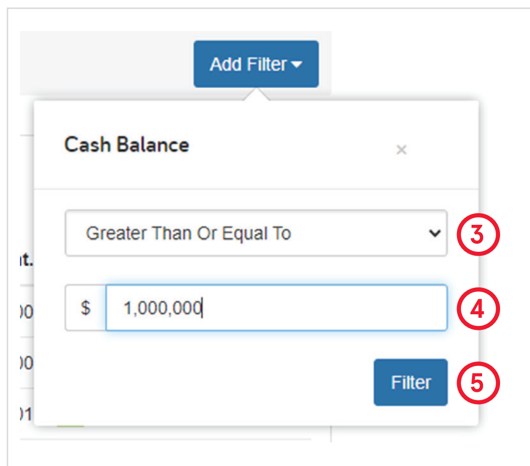
Step 3. From pop-up, select **Greater Than Or Equal To, Less Than Or Equal To,** or **In Between.**

Step 4. Enter value(s).

Step 5. Click **Filter.**

Filter by cash balance





You can identify clients with large cash balances.

Step 1. Click **Add Filter.**

Step 2. Select **Cash Balance.**

Step 3. From pop-up, 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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