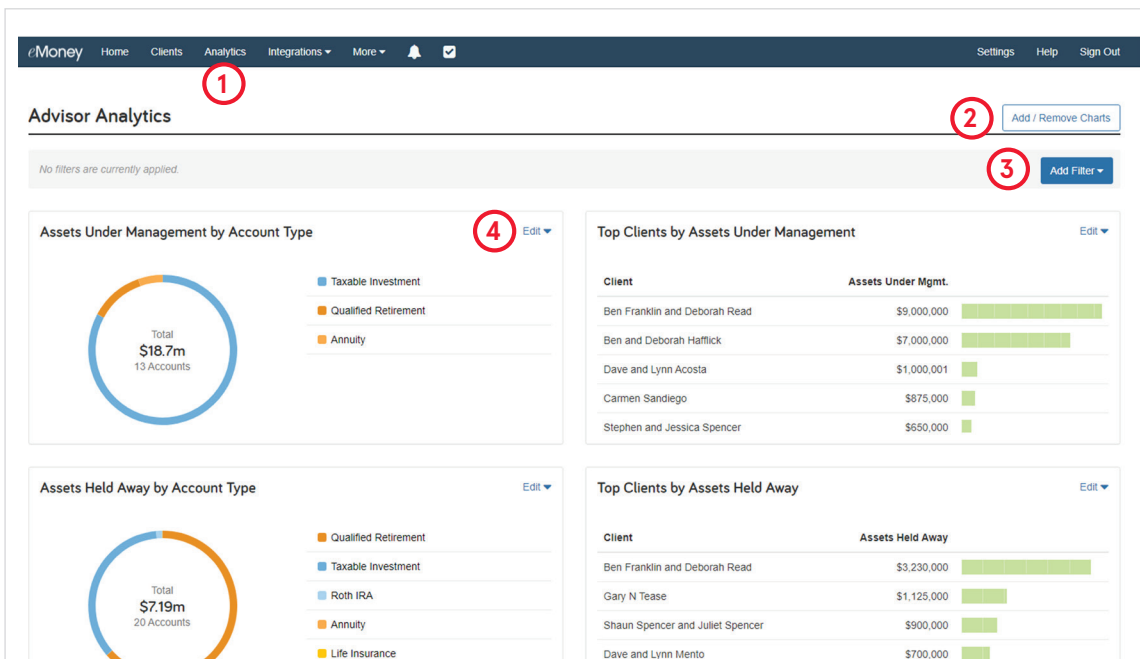


eMoney gives you the tools you need

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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Not a deposit • Not insured by any federal agency

Add/remove charts

Add / Remove Charts 4 Done

All

Assets

Clients

Compliance


Holdings

Insurance

Liabilities

Marketing

Planning

Chart 

Asset Status - [Preview](#) Remove
The percentage of assets under management value compared to total assets value.

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

Assets Held Away by Institution - [Preview](#) Remove
The total value of assets held away broken down by institution.

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

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

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

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

The screenshot shows a software interface with a table titled "Top Clients by Assets Under Management" and a filter dropdown menu. The table lists five clients with their names and assets under management. The filter dropdown menu is open, showing a list of filter options.

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 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**.

The screenshot illustrates the process of adding a filter for Client Age. It is divided into two main sections:

Left Section: Filter Selection

- At the top, there is a button labeled "Add / Remove Charts".
- Below it is a table with columns "Account Value" and "Filter". The table contains the following rows:

Account Value	Filter
\$9,000,000	Cash Balance
\$7,000,000	Client Age
\$1,000,001	Client Age Group
\$875,000	Client Child Age
- To the right of the table is a vertical list of filter categories: "Account Connection Status", "Account Sub-Type", "Account Type", "Account Value", "Cash Balance", "Client Age", "Client Age Group", and "Client Child Age".
- The "Client Age" filter is highlighted with a red circle labeled "2".
- At the top of this section is a button labeled "Add Filter" with a red circle labeled "1" next to it.

Right Section: Client Age Filter Configuration

- A pop-up dialog titled "Client Age" is open.
- At the top of the dialog is a dropdown menu set to "In Between", with a red circle labeled "3" next to it.
- Below the dropdown are two input fields. The first field contains the number "55" and is highlighted with a red circle labeled "4".
- Between the two input fields is the word "And".
- The second input field contains the number "70".
- At the bottom right of the dialog is a blue button labeled "Filter", with a red circle labeled "5" next to it.

Filter by account type

Add Filter ①

Account Type ②

- Cash Alternative
- Life Insurance
- Medical Policy
- Mortgage
- Qualified Retirement
- ③ Taxable Investment

Include **Exclude** ④ **Filter**

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

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 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

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 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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