Advisor & Client Connections

In this userguide we will explain what Advisor and Client connections are. We will also illustrate where to see if a connection is advisor or client managed.

An **advisor connection** is a link to a financial institution that requires advisor credentials to establish. All advisor connections can **only** be created from an eMoney Advisor license. Assistants and Planners may manage an advisor connection only after it has been established. This connection allows you to populate your book of business with that particular financial institution. Accounts are brought into eMoney by entering a client specific identifier in the Add Accounts wizard. For more information on Adding and Managing an advisor connection, refer to this Advisor Connections userguide.

A **client connection** differs form an advisor connection in that it uses client specific credentials. Client connections can be established both from the advisor side (via the connections console) and the client website. It is a best practice to have all client connections established from the client's website. Encouraging your clients to establish their connections will help to fully build out their organizer and fact finder. For more information on adding a client connection, refer to this client facing Add Accounts userguide.

From time to time, connections require special attention. Periodically financial institutions will force you to reset your password, which you will then need to reset in eMoney as well. Connections are maintained under the eMoney license in which they were established. This is why it is important for your client's to establish their connections from their website, so that in the event credentials need to be updated they will be able to update from their website.

To easily determine if an existing connection is an Advisor or Client connection navigate to the Connections page. Click the All Connections drop down. Here you can sort between All Connections, Advisor Connections, and Client Connections.