Advisor Process Checklist

This guide will provide a high-level overview of important initial steps and best practices for a successful rollout of the eMoney application. Use this as a checklist to keep you on track! For additional information on the topics search the **Help** menu.

1. Before You Begin

☐ Establish Your Advisor Settings

The three main areas to focus on as you begin are in your Advisor Settings: **Sharing Rules**, **Branding**, and **Fact Defaults.** Uploading your logo is the first step in branding the application to your Firm! Sharing Rules allow your team to add, view and work on Client profiles, and the Fact Defaults streamline your data entry by taking care of trends in your book of business. Examples of these are average Retirement Age, State Income Tax, and the Living Expense Worksheet.

☐ Rename the "eMoney" Client Website

Rename and brand the Client Website to your Firm. Some creative examples we've heard are Wealth360, 365wealth, and Command Center.

☐ Upload Marketing Content to Your Firm's Website*

Check out examples of available videos in Advisor Branding Marketing. Find your subscription by clicking **More** > **Advisor Branded Marketing** (ABM). *For Advisor's who have the ABM subscription.

☐ Create a Login Link on Your Firm Website for Existing Clients

The login URL is the same for all your Clients. You can access it in Client Website Management area for any Client with an active website.

☐ Use Lead Capture

Engage prospective Clients with your own personal Lead Capture link. You can find it under **Settings** > **Lead Capture**. You can edit the headline and body to fit your Firm's style, then embed the link on your Firm website or a social media post. Your Leads will filter in through your Client list.

Helpful Resources for You During This Phase:

- Settings Best Practices
- Advisor Branded Marketing
  *For Advisors who subscribe to ABM, search the **Help** menu for this interactive resource.
- Client Website URL
- Traditional Lead Capture Overview

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2. Gather & Import Data

☐ Take Advantage of Connections & Integrations

Connections and Integrations can be a great way to get Client data into the system and give you access to other platforms you currently use. Check out the **Applications** drop-down menu for access to a list of eMoney's current Integration partners.

☐ Use Basic Facts for Review

Master the use of Basic Facts for review purposes so you and your Client can work together to populate accurate information. The **Start Presenting** button in the bottom right corner of the system will put you into safe mode for the duration of your meeting.

☐ Be Proactive with Setting Alerts

Alerts will keep you and your team updated on Client inputs and activity once you give them access to the Client Website. To set these, select the **Bell** icon from the top navigation bar and click **Manage.**

Helpful Resources for You During This Phase:

- What Are Integrations?
- All About Connections
- Integrations Working Together
- Basic Facts Overview
- Alerts and Tasks

3. Client Onboarding

☐ Set Yourself Up

The best way to understand the Client Website is to go through the experience yourself! Set yourself up with a Client Website to understand the various features the website offers and be able to better assist with questions that your Clients may have. Navigate to the **Client Website Globe**, click **Set up Client Website**, then click **Set up Invitation**.

☐ Customize the Client Experience

By default, the Client Website offers a lot of features; keep in mind *less is more!* Pick the top couple of features you think are best for your Client base and use the **Manage Client Website** area > **Features** tab to customize their experience. Utilize the **Saving** options to set your defaults for all Clients.

☐ Prepopulate as Much as Possible

A Client that logs into their website and sees a blank slate will not be encouraged to take action. As stated under the Gather & Import Data section above, it is a best practice to prepopulate the assets under your management first using connections and/or integrations, then add photos if available, and upload important documents to their Vault. This will encourage them to fill in the gaps for an accurate view of their financial picture.

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☐ Start Small

Pick a handful of Clients you have the best relationship with to use as a focus group for the website. These Clients can help to provide feedback on what they liked and what they didn't like so that you can tweak the experience for future Client Website rollouts.

☐ Introduce the Client Website with Supplemental Material

An essential step in gaining Client engagement is providing context around *why* the Client Website is important and how it will help them. You can achieve this by creating a custom welcome message via email and/or using the content available in ABM such as videos and slicks, if you are an ABM subscriber. If you do not subscribe to ABM, use the Client-facing slicks that are linked below.

Helpful Resources for You & *Your Client* During This Phase:

For You:

- Client Website Setup
- Client Website Summary
- Advisor Branded Marketing
  *For Advisors who subscribe to ABM, search the **Help** menu for this interactive resource.

For *Your Client*:

- Safe and Secure
- Take Control of Your Financial World
- A Guide to Getting Started
- Adding Accounts
- Client Vault Checklist
- Forgot Your Password?

4. Plan Away!

☐ Check Your Work

Your Reports and Advanced Plans are only as good as the information entered in the Client's Facts. Always check your work to ensure the Facts are entered correctly using the Cash Flow, Ledger, and Fact Summary Reports.

☐ Master the Interactive Planning Tools

The Interactive Planning Tools known as the Goal Planner, Decision Center, and Distribution Center allow for powerful and engaging Client meetings. Practice on one of our Sample Clients to get your flow down and perfect your presentation.

☐ Utilize Pre-Built Presentations

Pre-built presentations save you time when creating printed deliverables. Look for the **Go to Presentation** button in the Basic Facts, Goal Planner, Decision Center, and Foundational Planning to get started.

☐ Loop in Other Professionals

Alliance Partners help to provide a more holistic planning experience for your Clients. Include other professionals that your Client may work with such as their Accountant or Estate Attorney to access Vault documents or Tax reports. To add Alliance Partners, click **Settings**, then click **Alliance Partners**.

Helpful Resources for You During This Phase:

- Data Entry Verification
- Interactive Planning Tools
- Alliance Partners