



# eMoney + Addepar

Our integration with eMoney allows for a more holistic view of portfolios and reports, empowering advisors to provide comprehensive financial planning that meets their clients' goals.

## GAIN A COMPREHENSIVE VIEW OF ALL CLIENT PORTFOLIOS

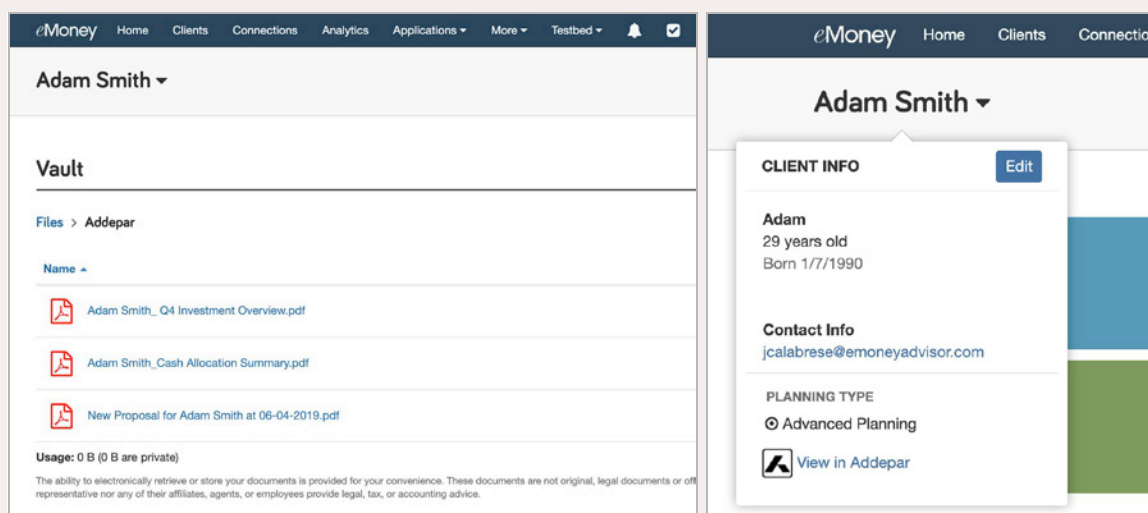
Bring in aggregated, reconciled household and client data directly from Addepar. Data includes custodial data and private holdings, such as alternative investments.

## STRENGTHEN YOUR ADVICE

Addepar reports are available in the eMoney File Vault, enabling advisors to provide more holistic insight without having to transition between two systems.

## STREAMLINE WORKFLOWS

Seamless transition between eMoney and Addepar provides advisors with efficient access to client financial plans and portfolio performance.



Users can toggle between applications and have secure access to Addepar reports via eMoney file vault

eMoney Advisor, LLC ("eMoney") provides technology solutions and services that help people talk about money. Rooted in comprehensive financial planning, eMoney's solutions strengthen client relationships, streamline business operations, enhance business development and drive overall growth. As of March 31, 2019, more than 60,000 financial professionals across firms of all sizes use the eMoney platform to serve 4.4 million households throughout the U.S. For more information, please visit: [www.emoneyadvisor.com](http://www.emoneyadvisor.com).

## KEY FEATURES

### Automated Data Sync

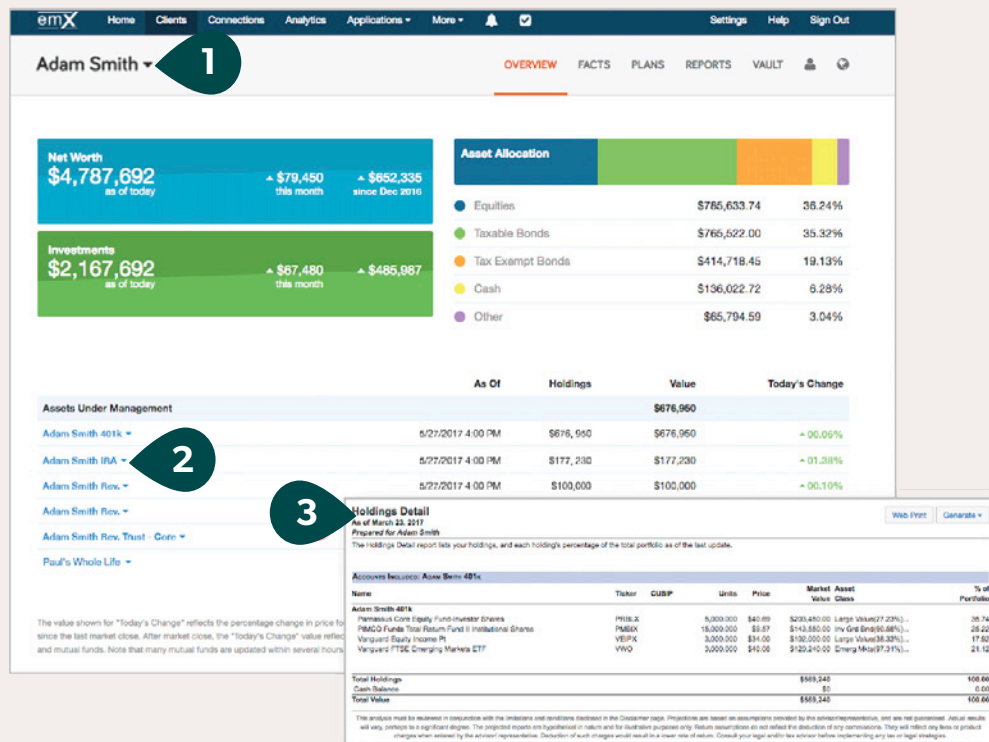
Client, account, and holdings data is delivered daily from Addepar to eMoney, enabling powerful financial planning workflows including retirement savings, planning and forecasting, and Monte Carlo simulations.

### Addepar Reports in eMoney

Reports generated in Addepar are available on demand within the eMoney File Vault, letting advisors reference Addepar performance data or share files directly with clients through the eMoney portal.

### Access Addepar from eMoney

Seamlessly transition between a client's financial plan in eMoney and their portfolio performance in Addepar.



### Access your Addepar data in eMoney

Data is available at the: 1. Client level 2. Account level 3. Holding level of detail

Addepar is a wealth management platform that specializes in data aggregation, analytics and reporting for even the most complex investment portfolios. Founded in 2009 by Joe Lonsdale, who currently serves as an active Chairman of its Board of Directors and General Partner at 8VC, the company's platform aggregates portfolio, market and client data all in one place. It provides asset owners and advisors a clearer financial picture at every level, allowing them to make more informed and timely investment decisions. Addepar works with hundreds of leading financial advisors, family offices and large financial institutions that manage data for over \$2.5 trillion of assets on the company's platform. In 2020, Addepar was named as a Forbes Fintech 50 company and honored as a member of the CB Insights Fintech 250. Addepar is headquartered in Silicon Valley and has offices in New York City and Salt Lake City. All brokerage services offered through Acervus Securities Inc., member FINRA / SIPC.