



JULY 2019

# 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

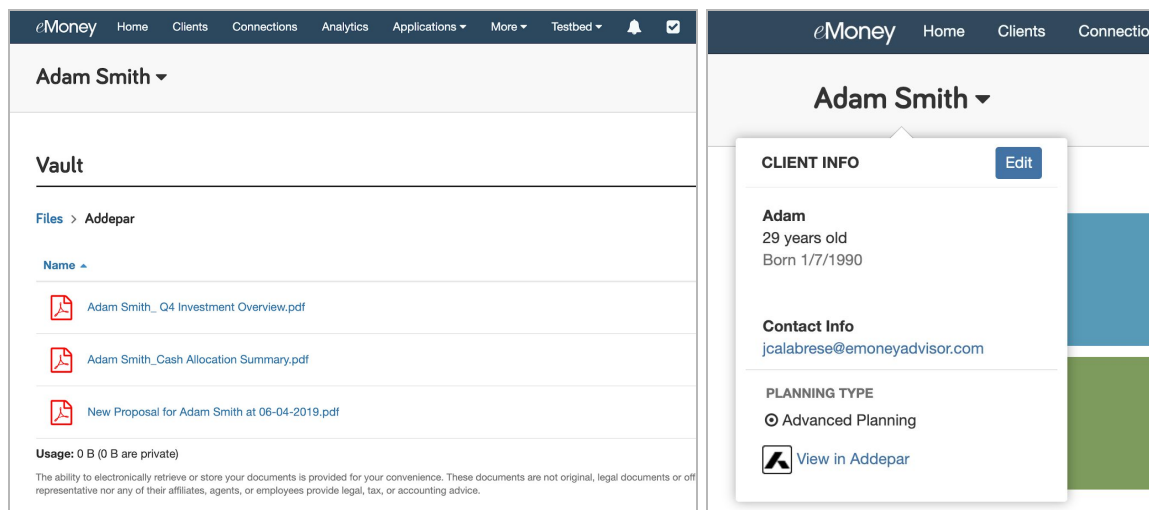
Bring in aggregated, reconciled household and client data directly from Addepar. Data includes custodial data and private holdings, such as alternative investments.

## 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

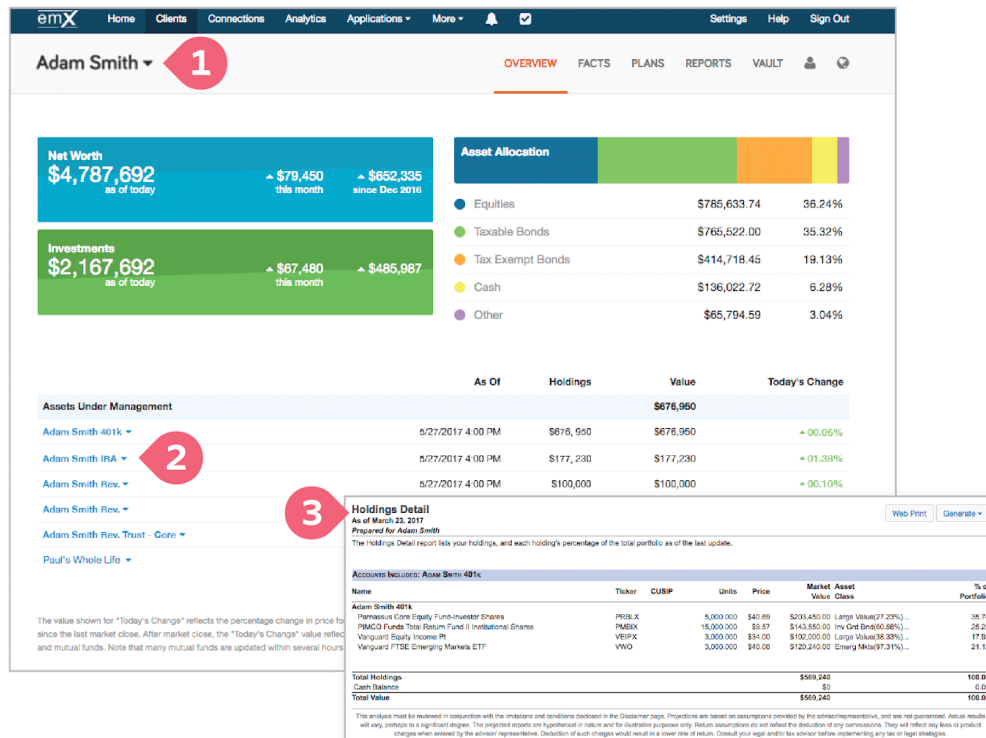
Client, account, and holdings data is delivered daily from Addepar to eMoney, enabling powerful financial planning workflows including retirement savings, planning and forecasting, and Monte Carlo simulations.

### 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 the financial operating system that brings common sense and data-driven investing to our financial world. Addepar gives asset owners and advisors a clearer financial picture at every level, all in one place. It handles all types of assets denominated in any currency. With customizable reporting, financial advisors can visualize and communicate relevant information to anyone who needs it. Secure, scalable, and fast, Addepar is purpose-built to power the global financial system. Hundreds of single and multi-family offices, wealth advisors, large financial institutions, endowments, and foundations manage over \$1 trillion in assets on the Addepar platform. Addepar has offices in Silicon Valley, New York, Chicago, and Salt Lake City.