ADDEPAR

INTEGRATIONS

Financial Planning with eMoney

Our integration allows for a more holistic view of portfolios, empowering advisors to build comprehensive financial plans that meet their clients' goals and objectives.
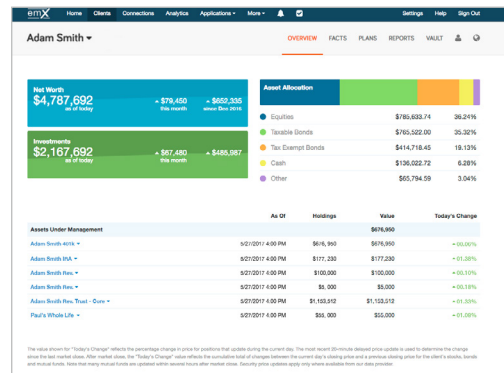
HOW THE INTEGRATION WORKS

Client, account and holdings data is automatically delivered from Addepar to eMoney daily, enabling powerful financial planning workflows including: retirement savings, planning and forecasting, college savings, spending analysis, budgeting, "what if" scenarios, and Monte Carlo simulations.

CUSTODIANS & PRIME BROKERS

FUND ADMINISTRATORS & ALTS MARKETPLACES

ONE CONNECTION DAILY UPDATES

THIRD PARTY DATA AGGREGATORS

1. AGGREGATION

Addepar aggregates data from a variety of sources, expanding your investment portfolio coverage

2. INTEGRATION

Addepar pushes the aggregated and reconciled data to eMoney, removing the need for duplicative data entry

3. ACCESS

Access and use this data to build financial plans in eMoney

eMoney Advisor

eMoney Advisor, LLC ("eMoney"), based in Radnor, Pennsylvania, is the only scalable wealth management technology developed for financial professionals, firms, and enterprises of all sizes. Rooted in collaborative financial planning, eMoney's technology enables financial professionals to build stronger client relationships, streamline business operations, and drive revenue and growth. Developed and perfected by nearly 500 passionate, innovative, and dedicated employees in three locations, eMoney's solutions transform the wealth management experience. For more information, please visit: www.emoneyadvisor.com.

Eliminate duplicative data entry

Addepar data will be reflected automatically in eMoney, eliminating the need for manual data entry and maintaining duplicate records.

Gain a more holistic view across portfolios

Bring in aggregated, reconciled data directly from Addepar. Data includes custodial data as well as offline holdings, such as alternative investments.

Leverage a single source of truth across systems

Achieve consistency across Addepar and eMoney workflows. Data presented in a financial plan will match the values in client reports, helping to reduce inconsistencies and questions.

Access your Addepar data in eMoney

Data is available at the **1.** client level, **2.** account level, and **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.

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