eMoney

LIVE TRAINING

Advisor Roundtable

Learning Objectives

- Learn from other advisors currently using eMoney.
- Understand strategies to introduce eMoney to clients.

By the end of the session, you should have a better understanding of:

- How to address client worries and objections.
- How to conduct an interactive meeting using the eMoney interactive tools.

Get Ready

8:45am - 9am

Get Started

9am - 12:00pm

TOPICS

- How to Position eMoney
- Presenting with eMoney
- Introducing eMoney to a New Client
- Client Worries & Objections
- Interactive Planning Tools
- How to Leverage Yourself with eMoney
- How Your Peers are Using eMoney

Next Steps

- Visit eMoney's Help Menu for additional training resources.
- Visit the eMoney Advisor Blog to access tips, and best practices blog.emoneyadvisor.com.
- Listen to pre-recorded Masters Series Webexes.

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