*e*Money

Platform Essentials

In Platform Essentials you will learn an overview of the main features on the client portal, the basic flow for On-Boarding a client, and an introduction to Foundational Planning.

Platform Essentials

9:00 a.m. – 12:30 p.m.

Topics

- Foundations for Success
- Case Study Introduction
- Data Entry Basics
    - Assets Under Management
    - Basic Facts
- Client Site
    - Features and Customization

Next Steps

- Please Note: this session does not cover Foundational Planning. Please watch the Core Concepts Webinar 'Creating a Simple Financial Plan' to learn about that tool.

- Visit eMoney's Help Menu for additional training resources.

- Listen to available webinars in the Intermediate Series, Advanced Series, and Impactful Extras webinar sessions.

- The Platform Essentials course qualifies for 4 CFP® Continuing Education Credits.

https://emoneyadvisor.com   training@emoneyadvisor.com   1.888.362.8482