Introduction to eMoney

eMoney is the financial planning platform we use to track and analyze your financial health. This program is also available for you to utilize to track your own personal financial goals and more.

eMoney: Your Personal Financial Management Website

- eMoney serves as your own personal financial management portal. This software contains secure, comprehensive tools that empower you to take charge of your financial life with our team as your quarterback. You will leverage account aggregation, view your net worth, and track your cash flow, financial goals, and spending, all in one place. This platform has your own financial goal tracking, unlimited document storage, self-designed budgets to track spending, and account aggregation, to provide you with your complete financial picture at your fingertips.
- A Window into Your Financial World/Seeing Your Full Financial Picture in One Place:

Organizer	Enter in your essential details and connect to your financial accounts.
S Goals	Add your financial goals, track progress towards funding and achieving those goals, and gauge how these goals impact your longterm financial outlook.
Spending	Monitor your cash flow transactions and create budgets to help you stay on track.
S S S S S S S S S S S S S S S S S S S	Learn more about your asset allocation, view the value of your current holdings, and take a look at your asset types for a detailed breakdown of each of your investments.
Vault	This is your secure digital document storage repository. Upload all of your important and legal documents for easy tracking, storage, and access.





