

Client Site Organizer

Connect your financial decisions to the people and things that matter most

eMoney
Advisor

Organize.
Prioritize.
Personalize.



People & Property

Personalize your Organizer to reflect the people and things that are most valuable to you.

Accounts

Connect all of your financial accounts to build a comprehensive picture of your financial life.

Professional Contacts

Store all your professional contacts in one place and access them from anywhere.

Income, Expenses & Savings

See a breakdown of what you own, what you owe and how your savings are impacted.

Future Goals

Tell us what you hope to accomplish and we'll build a plan to help you get there.

Financial Priorities

Prioritize your financial objectives and easily re-shift your focus as your goals change.

Risk Tolerance

Learn how much risk you're really comfortable taking in your investments.