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Planning Platform

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Jun. 20, 2018

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“A combined wealth management and tax management service offering provides independent advisors with a powerful differentiator, and eMoney’s solutions can empower our advisors to turbocharge this differentiator on behalf of clients,” said Bob Oros, CEO of HD Vest Financial Services. “The state-of-the-art eMoney financial planning software and client portal enable our advisors to demonstrate more value, and work more collaboratively with clients to craft and implement holistic, tax-smart wealth management strategies. We will continue to build out our platform to serve as an ecosystem where independent advisors can access the best tools from across the industry to increase client retention and lay the groundwork for scalable asset and practice growth.”

With eMoney, independent advisors that have partnered with HD Vest can:

- Create holistic financial plans with eMoney for all engaged households which aggregate information about all accounts and assets, including mortgages, real estate, investments, and taxes.
- Visually demonstrate the projected benefits of a potential trade or strategy, and compare them to the risks of the opportunity—and then work with clients to make changes to financial plans based on these presentations in real time.

- Communicate in real time with clients using eMoney’s interactive client portal.

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doing and why we’re doing it, and enables us to provide clients with a clear vision of their entire financial picture. This added value has been instrumental in strengthening our client relationships and retention.”

“Investors have high expectations in today’s marketplace, and our innovative technology gives independent advisors the competitive edge they need to efficiently—and holistically—service and advise clients over the long term,” said Stephen Langlois, Head of Business Development at eMoney. “We are privileged to work with the HD Vest team to empower the advisors in its network with the tools, services, and capabilities they need to increase their assets under management and serve clients better.”

Accounting • Technology

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