

# Top 5 Reasons eMoney + Vanilla are Stronger Together

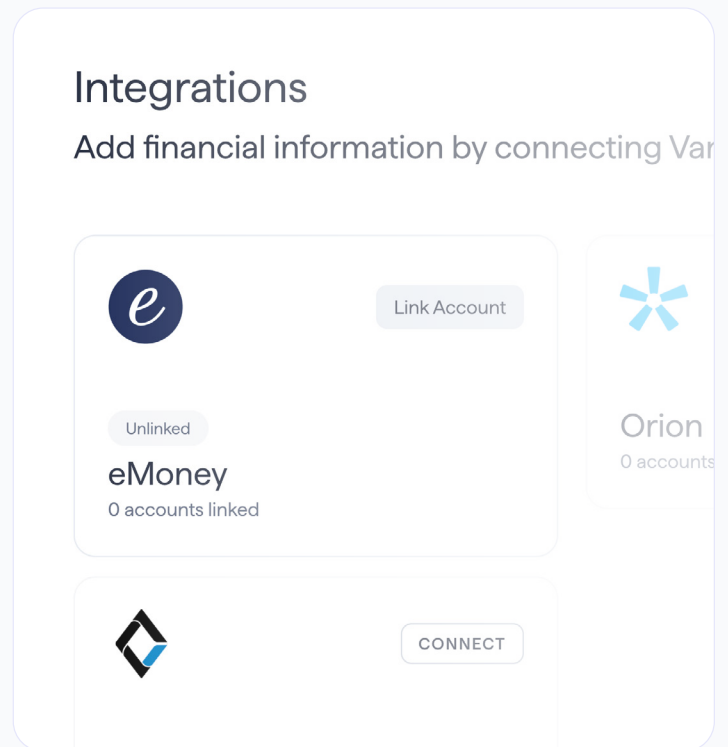
By combining eMoney's financial planning precision with Vanilla's estate planning depth, advisors unlock a powerful, unified approach to serving the whole client—with greater flexibility, accuracy, and continuity as their needs evolve.

## 1 Comprehensive financial and estate planning

- Achieve a seamless integration of financial and estate data for a 360° view of short- and long-term planning
- Combine aggregated assets and liabilities with visualized estate flowcharts and wealth transfer strategies in a single source of truth
- Unify advisors, estate attorneys, and clients around a central, always-current planning source

## 2 Client-centric visualizations

- Layer Vanilla's dynamic estate maps with eMoney's robust financial dashboards to present holistic plans in a visually compelling, digestible format
- Improve client comprehension and engagement, especially during sensitive legacy planning conversations
- Create a more cohesive client experience with synced visuals, aligned projections, and fewer discrepancies



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## 3 Streamlined advisor workflows

- Eliminate redundancies and constant toggling between siloed platforms
- Reduce reliance on static documents, eliminate version control issues, and minimize miscommunications for smoother execution across teams
- Surface gaps in planning faster, saving time and creating quicker paths to value

## 4 Deeper insights and personalized recommendations

- Model how different scenarios—like gifting strategies or tax law changes—impact long-term outcomes with *e*Money's financial plan projections and Vanilla's estate simulations
- Enable proactive, personalized guidance tailored to each client's goals and family dynamics
- Ensure consistency across financial and estate planning outputs

## 5 Future-proofed planning conversations

- Accommodate clients' evolving planning needs through wealth growth and life events
- Position your firm as a forward-thinking, tech-enabled partner for clients in competitive markets
- Be better equipped to adapt plans over time while keeping planning pillars in sync

The screenshot displays the Vanilla software interface. On the left, the 'Integrations' section shows 'eMoney' with a 'Setup Pending' status and 'Orion' as 'NOT CONNECTED'. On the right, 'Step 2: Link Assets and Liabilities' is shown, with a table of assets and liabilities to be linked to the estate profile.

Assets & Liabilities	Owner	Total Net Assets
<input type="checkbox"/> Assets 16/17		\$5,404,165.00
<input checked="" type="checkbox"/> Antonio's IRA	Antonio Esposito	\$274,165.00
<input checked="" type="checkbox"/> Antonio's Landrover	Antonio Esposito	\$30,000.00
<input checked="" type="checkbox"/> Jewelry	Antonio Esposito	\$10,000.00
<input checked="" type="checkbox"/> Marco and Antonio Brokerage Fund	Joint Ownership (with Right of Survivorship)	\$710,000.00
<input checked="" type="checkbox"/> Survivorship Whole Life	Joint Ownership (with Right of Survivorship)	0
<input checked="" type="checkbox"/> Joint Money Market	Joint Ownership (with Right of Survivorship)	\$180,000.00
<input checked="" type="checkbox"/> Taxable Investment	Joint Ownership (with Right of Survivorship)	\$150,000.00
<input type="checkbox"/> Business	Joint Ownership (with Right of Survivorship)	\$2,000,000.00
<input checked="" type="checkbox"/> Joint Checking	Joint Ownership (with Right of Survivorship)	\$20,000.00
<input checked="" type="checkbox"/> Annuity	Joint Ownership (with Right of Survivorship)	\$200,000.00
<input checked="" type="checkbox"/> 529 Elder Wood Lane	Joint Ownership (with Right of Survivorship)	\$1,000,000.00