

eMoney Master Series Presents:

Rolling Out the Client Portal

We Will Get Started Shortly...

What We'll Cover!

- Developing your Pitch
- Who to Introduce First
- Sending the Invite
- Onboarding Wizard
- Setting Expectations
- Customization
- The Power of the Vault
- Security
- Alliance Partners
- Additional Resources

The Power of Storytelling



Retention Rates

- Stats = 5 - 10%
- Pictures = 25%
- **Stories = 65 - 70%**

Transform Your Pitch

**ORGANIZE YOUR FINANCIAL LIFE
PERSONAL FINANCIAL PLATFORM
EVERYTHING IN ONE PLACE
SIMPLIFY
UPDATE DAILY
ACCESS ANYWHERE
SAFE AND SECURE
ALERTS AND ALARMS
COLLABORATIVE
PEACE OF MIND
DYNAMIC**



Transforming Your Pitch

“The Client Portal is a *dynamic* tool that *updates daily*. It is going to allow you to see a *holistic* view of everything you have *in one place* so that you can easily *organize your financial life*. This *safe and secure* platform will allow you to access your data from *anywhere in the world*, giving you the *peace of mind* that you deserve.”

The Client Portal's #1 Best Practice?

Get yourself on the system!

Who Do You Start With?

- Yourself
- Family and friends
- Clients who you have the best relationship with
- Stay away from your top Clients to start