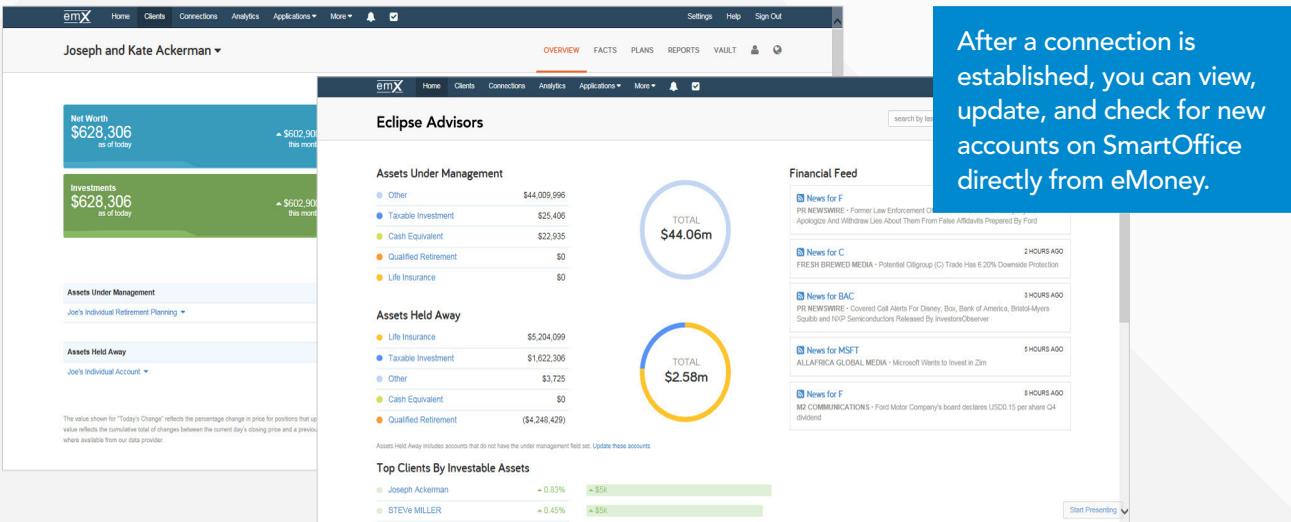# SmartOffice
eMONEY INTEGRATION

Engage your existing client data to simplify the financial planning process

The SmartOffice integration with eMoney streamlines the process of creating financial plans for your client by auto-filling the required client information—from names and addresses to the most complex and current investment and policy data. Clicking the eMoney button in SmartOffice allows you to move seamlessly between the two applications and share data. This simple task eliminates redundant data entry, reduces errors, and saves you valuable time. Designed for maximum flexibility and interoperability, this integration is a powerful, feature rich solution that untangles complicated data entry.

Automate and accelerate your financial planning processes

Creating financial plans is one of the most valuable services you offer your clients. But the high-level benefit to your clients should not be stalled by the low-level administrative task of filling out forms. The eMoney integration automates this basic requirement of the planning process, ending the need to toggle between multiple sites, copy and paste information, and then manually verify that the information is correct. Simply click on the eMoney button in SmartOffice to instantly access and leverage current, accurate information. Once in the eMoney application, you can select which investment and policy data to transfer from the client's SmartOffice record.

After a connection is established, you can view, update, and check for new accounts on SmartOffice directly from eMoney.

Benefits of the eMoney integration for SmartOffice

- **One-click integration:** With a single click in SmartOffice, you can launch the eMoney application and transfer the key demographic data for each client from SmartOffice.
- **Most up-to-date information:** Data is exported and/or retrieved automatically—so you always have the latest client information when creating a new financial plan.
- **Automated aasset data transfer:** Policy and investment account data in SmartOffice is easily and accurately shared between SmartOffice and exported to eMoney to reduce errors and ensure data integrity.

Ebix