



Advisor Roundtable

In the Advisor Roundtable Workshop, you will learn insights and knowledge on how your peers are addressing relevant topics to our industry today and how the eMoney Platform is designed to assist.

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9:00 a.m. – 11:30 a.m.

Topics

- Overview of Industry Research
- Roundtable Questions
- Peer Discussion and Sharing
- How to Leverage eMoney

Next Steps

- Visit the eMoney Advisor Blog to access additional tips and best practices
- Visit eMoney's Help Menu for additional training resources.
- Listen to pre-recorded Masters Series webinar sessions.

