zocks

eMoney Integration

Go from conversation to advice in minutes, not days

- Give every client fast, personalized service
- Close more prospects
- Save more time

It can take days or weeks to gather all the client information you need to produce a financial plan. The process is slow, frustrating for clients, and, in some instances, causes prospects to decide not to move forward with an advisor.

Firms know that “time to advice” is critical. While online forms help accelerate the process, data from meeting notes, documents,CRM records, and emails often still need to be added manually to create a plan. Plus, clients don’t like sharing their information across multiple meetings, only to later fill out the same details again on a long form.

Zocks solves this by capturing information from every client touchpoint – conversations, documents, CRM, email, and forms – and syncing the data you choose to eMoney. Whether processing meeting notes, uploading tax returns, or pulling CRM data, Zocks eliminates manual entry and instantly updates eMoney. That's a better experience for clients, saves advisors hours of work, and closes more prospects with faster plan delivery.

Instantly update a client’s financial plan

Once a financial plan is created, it needs to be kept up to date. As things change in your clients lives, you need to add that information into eMoney to update their plan. Now, when a client mentions a life change in a conversation or email, Zocks captures it and updates eMoney so you don’t have to.

Give every client fast, personalized service

Unlike other tools, this eMoney integration works two ways. Zocks doesn’t just send client data into eMoney, it also uses the client’s financial information in eMoney to do even more of your day-to-day work. For example, Zocks includes a client’s personal and financial information in your meeting prep, writes detailed replies to client emails, and instantly answers questions about their finances. Now you’re able to deliver faster, more personalized service — and ultimately take on more households.

Key Capabilities

Automatically Fill Out eMoney Facts

Zocks captures the right information from your client conversations, combines it with up-to-date data in your CRM and email, then instantly fills out eMoney Facts and fact finders.

Instantly Update Financial Plans

When a client mentions a life change in a conversation or email, Zocks captures it & updates eMoney so you don't have to.

Reply to Client Emails in Seconds

When a client emails you a question like, "Have we saved enough for tuition at this college?" Zocks pulls the latest data from their eMoney plan & instantly drafts a detailed reply.

Process Documents Instantly

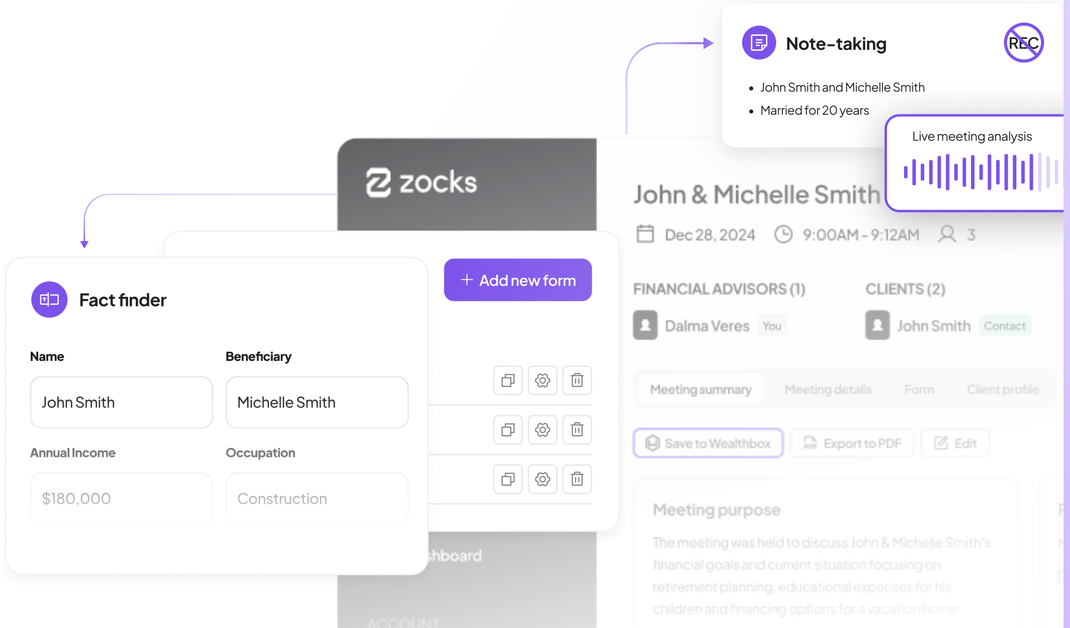
Upload tax returns, statements, or intake forms and Zocks extracts the financial details and syncs them directly to eMoney and your CRM in seconds.

Smart Meeting Prep

Zocks includes the client's financial information from eMoney in your meeting prep. That means you're all set for annual reviews — or any meeting where finances come up.

Ask Anything

Have a question about a client's finances? Just ask Zocks. No more logging into different systems like eMoney and your CRM to find the answers you need.



zocks

Zocks is the AI Assistant for financial advisors

Zocks is the AI Assistant for financial advisors. The platform saves advisors 10+ hours a week by automating their meeting notes, intake forms, client emails & more. The enterprise-ready solution transforms client conversations into structured, actionable intelligence for firms of any size. Thousands of firms use it to increase advisor productivity, recruit & retain more advisors, and get the client data they need to grow AUM.

To learn more and start a free trial, visit zocks.io or scan the QR code