I take pride in the depth of my relationships with clients. From my newest clients to those who have been with me for generations, I strive to be an active participant in your financial lives. That's why I'm excited to introduce you to our client technology platform through eMoney Advisor.

This portal is simple. It brings together your entire financial picture into one private, personalized dashboard that makes organizing and planning your financial life easier than ever before. For you, this means a secure financial website to house all your financial information. For me, this means highly customized and accurate investment plans that update in real time. And for all of us, it means a more collaborative wealth management experience.

Here are a few other key features:

Investments – View interactive charts and detailed views help monitor all your accounts.

Safe Document Storage – The Vault safely stores your most important financial documents, accessible 24/7".

Spending Tracking and Budgeting – Set budgets to help reach your savings goals, and track how much you're spending and where you're spending it.

Simple and Safe Connections – The Client Site uses Connections to aggregate your financial account information safely and securely, allowing me to build a financial plan with all your information in mind.

Mobile and Screen Sharing – Access your complete financial picture from your mobile device, 24/7 and easily collaborate with me in real-time through screen share from wherever you are.

Enhanced Security – The new portal uses 256-bit Secure Socket Layer (SSL) technology, which is the highest level of encryption currently available.

View this short video to learn how to get started.

I hope you're excited as I am! If you have any questions about eMoney, please do not hesitate to call us at 414-764-7330 or email me at social@dbtaxinc.com

Regards,
DB Tax & Wealth

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