
eMoney Advisor adds integration partners

By Editorial Staff *Thu, Nov 23, 2017*

The Fidelity-owned advisory software firm announced new integrations with Charles Schwab, Envestnet and Box.

eMoney Advisor has announced that it plans to integrate with OpenView Gateway, the integration platform from Schwab Advisor Services (including Schwab Advisor Center), Envestnet | Tamarac, and cloud content management leader Box.

The integration with Schwab is planned for the last quarter of 2017. The Envestnet and Box integrations are scheduled to go live in 2018, according to a release this week from eMoney, a unit of Fidelity Investments.

When all three integration are complete, 20 integrations will be available on eMoney's financial planning platform. Its nearly 50,000 users will be able to "transition between sites, securely accessing shared data and streamlining their planning processes," the release said.

In the first quarter of 2018, eMoney's integrations with Envestnet | Tamarac and Box will offer these functions:

- Envestnet |Tamarac - Investors and their advisors benefit from bi-directional, single sign-on access between both the advisor and client portals of eMoney and Tamarac.
- Box - The Box integration meets the criteria required in SEC ruling 17a-4 (aka WORM: Write Once, Read Many) and helps broker-dealers comply with FINRA and SEC rules. Users will be able to access their Box content from the eMoney Vault, allowing the safe transfer of sensitive information.

eMoney announced in April that the firm will integrate with CapitalRock's RightBRIDGE product recommendation software in 2018. Earlier this year, eMoney launched integrations with Wealthbox and Black Diamond and enhanced integrations with Orion, Riskalyze, Envestnet and Fidelity Wealthscape.

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