Integration with eMoney

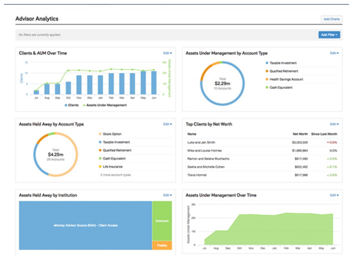
Financial planners and others can benefit from the eMoney integration with Max's leading cash management solution to help their clients earn more while staying FDIC insured.

Integration Benefits

Clients appreciate that Max provides the highest yielding, FDIC-insured option for cash not held in their brokerage accounts – whether for their emergency fund, the deposit for a planned real estate purchase, or as 'dry powder' awaiting investment. Unlike other "cash accounts," with Max, clients hold cash directly in their own high-yield savings accounts titled in their own name. All funds are same-day liquid.

Advisors benefit from offering a market-leading cash management option for held-away cash. The eMoney data integration is a seamless Advisor Connection that enables all Max balances to be incorporated into eMoney's industry-leading portal as well as the client's financial plan without the client having to enter in any login credentials.

How It Works



1. Email Concierge@MaxMyInterest.com to request the connection. Next, within eMoney add the connection by clicking **Connections** > **Add** > **Advisor Managed**

   Enter **Max** into the search box and click on **MaxMyInterest – via Direct Feed**. Enter your Max Advisor Dashboard login (email address) as the Representative ID and click **Connect**.

   Don't have a Max Advisor Dashboard account yet? You can register for free in a minute or two at MaxForAdvisors.com.

2. Once the connection is "Up to Date", you can add accounts. If the connection is "Pending Data", ensure your Rep ID is correct and your book of business was released to eMoney. If you have verified this, please wait 24-48 hours before reporting a problem to support. Note: The client ID is the Max Member Number shown on your Max Advisor Dashboard.

Note: This integration is a balance-only data feed. Clients also cannot use their login to their Max dashboard to connect with eMoney.

Questions? Need Help?

If you need support enabling the integration, contact eMoney support. If you have questions about Max, contact advisors@maxmyinterest.com or visit MaxMyInterest.com/Contact-Us to access our Knowledge Base and request assistance with client-specific issues.