



Tolerisk and eMoney Partner to Streamline Risk Tolerance and Financial Planning for Advisors

MARLTON, NJ, UNITED STATES, January 30, 2025 /EINPresswire.com/ -- Tolerisk, a leading provider of dynamic risk tolerance assessment tools, announced a partnership with eMoney Advisor, a leading provider of technology solutions and services that help people talk about money. This integration is designed for financial advisors who utilize both platforms to streamline their workflow and improve efficiency in client management.

"Unlike legacy client risk profiling tools, Tolerisk incorporates a client's financial data to allow advisors to measure the client's financial ability (capacity) to take risk over time. This integration between Tolerisk and eMoney advances the wealth management industry's goal of providing the very best advisor-client experience," said Mark Friedenthal, Founder & CEO of Tolerisk. "By seamlessly connecting client risk assessments with comprehensive financial planning, we're empowering advisors to deliver truly personalized advice and strengthen client relationships."

Luke White, Group Product Manager, Strategic Integrations and Partnerships, at eMoney, said: "We're excited to partner with Tolerisk to provide an integration that drives advisor efficiency and delivers on client requests."

Key benefits of the new integration include:

- Data Synchronization: Two-way exchange of financial data, ensuring accurate and up-to-date risk assessments and financial plans with a smooth advisor-client experience.
- Account Integration: Pulls account holdings from eMoney into Tolerisk, generating a Tolerisk score for those accounts and allowing for a more tailored, data-driven risk assessment.
- Client Importing: Enables the importing of client data between the platforms, reducing the need for redundant data entry.

Tolerisk's commitment to advisor satisfaction is evident in its consistently high ratings in the T3 Advisor Survey. In the [2024 survey](#), Tolerisk achieved a user satisfaction score of 8.87, significantly surpassing the industry average and building on its strong performance in previous years.

The eMoney integration further expands Tolerisk's reach, empowering advisors with seamless, data-driven solutions that simplify risk management and enhance client communication. The

Tolerisk integration is now available to all advisors with a Tolerisk subscription.

To explore the benefits of the Tolerisk and eMoney integration, visit the website or [book a demo](#).

About Tolerisk

Tolerisk® is an analytical, multidimensional risk-tolerance assessment tool designed to improve and enhance advisor-client relationships through in-depth risk evaluations. In contrast with traditional risk tolerance assessment tools, Tolerisk measures a host of factors, including a client's willingness and ability to take investment risk, client and advisor risk assumptions and the evolution of risk factors over time. For more information, visit <https://www.tolerisk.com/>.

About eMoney Advisor, LLC

eMoney Advisor, LLC ("eMoney") provides technology solutions and services that help people talk about money. Rooted in holistic financial planning, eMoney solutions strengthen client relationships, streamline business operations, enhance business development, and drive overall growth. More than 109,000 financial professionals across firms of all sizes use the eMoney platform to serve more than 6 million households throughout the U.S. For more information, please visit emoneyadvisor.com.

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