



Certificate of Completion

This award certifies that

Miles Zakow

Has successfully completed

eMoney Integration

Date of completion

09/10/2026

www.academy.zocks.io

The screenshot displays the Zocks Academy software interface. On the left is a dark sidebar with navigation options: MEETING HUB (with sub-options Live meetings, Upcoming, and Past Meetings), EMAIL HUB (Inbox), ANALYTICS HUB (Dashboard), and LIBRARY (Contacts). The main area shows a meeting titled "John & Michelle Smith Discovery Call" scheduled for July 28, 2025, from 9:00 AM to 9:54 AM with 3 participants. It lists Financial Advisors (Jayce Talis) and Clients (John Smith, Michelle Smith). Below this are tabs for Meeting summary, Meeting details, Forms, and Client Profile. Action buttons include Save to Salesforce, Export to PDF, Edit, Ask Assistant, Tasks, and Email. A floating note-taking window at the top left contains the text "Note-taking" and bullet points about John and Michelle Smith's marriage. A live meeting analysis audio waveform is also visible. On the right, a "Follow up tasks" section lists a task for Jayce to create retirement models and assign it to her in Salesforce.