

Welcome to Emoney! Your one stop for access to all your financial information. This guide will take you through the steps to adding your accounts. As always call or email with any questions.

1. Click on **Add** in the Accounts section under the Home page.



Jim and Jane Sample Education Center Help Join Screen Sharing Session Settings Log out

Home Organizer Workshop Spending Investments Vault Reports

FINANCIAL ALERTS MANAGE ALERTS

Trusted Advisor
 TrustedAdvisor@nomail.com
 Office: (888) 888-8888 All Contacts

NET WORTH TODAY
\$2,731,089
 THIS MONTH +\$1,387,861 +103.32%
 YEAR TO DATE +\$2,995,867 +1,131.46%

INVESTMENTS TODAY
\$1,328,373
 CHANGE² +\$612.88 +0.05%

ACCOUNTS + Add

Cash	\$22,704	>
Credit Cards	-\$10,929	>
Investments	\$1,330,401	>
Life Insurance	\$43,500	>
Loans	-\$1,279,155	>
Property	\$0	>
Stock Options	\$2,624,568	>


SPENDING
 Add bank accounts and credit cards to monitor transactions and analyze spending.
 + Add Accounts

BUDGETS
 Add bank accounts and credit cards to monitor transactions and analyze spending.
 + Add Accounts

PROTECTION

Variable Universal Life eMoney Advisor Source (E...	\$1,000,000
Variable Universal Life eMoney Advisor Source (E...	\$1,000,000
Auto eMoney Advisor Source (E...	

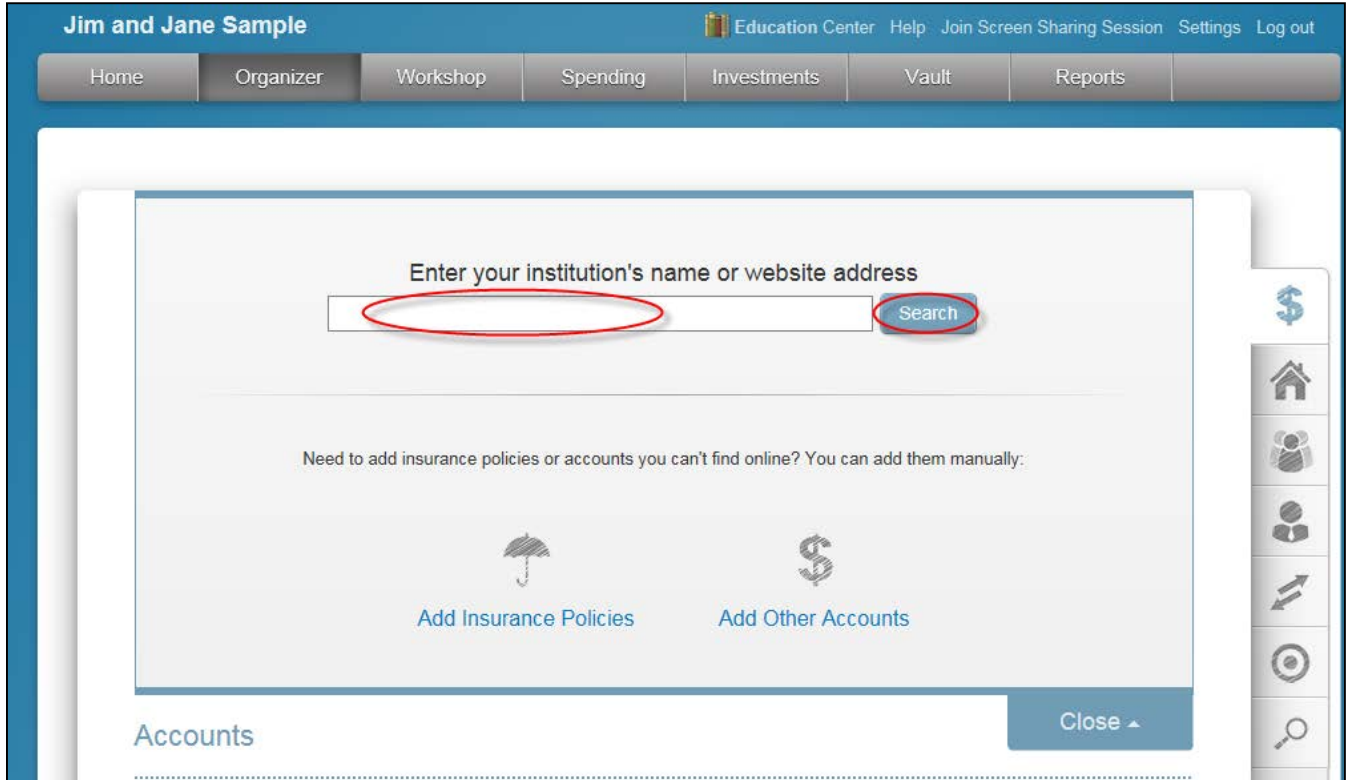
More

TOUR GUIDE
 Get an overview of how to get started with your personal financial website.
 GET STARTED ▶ 

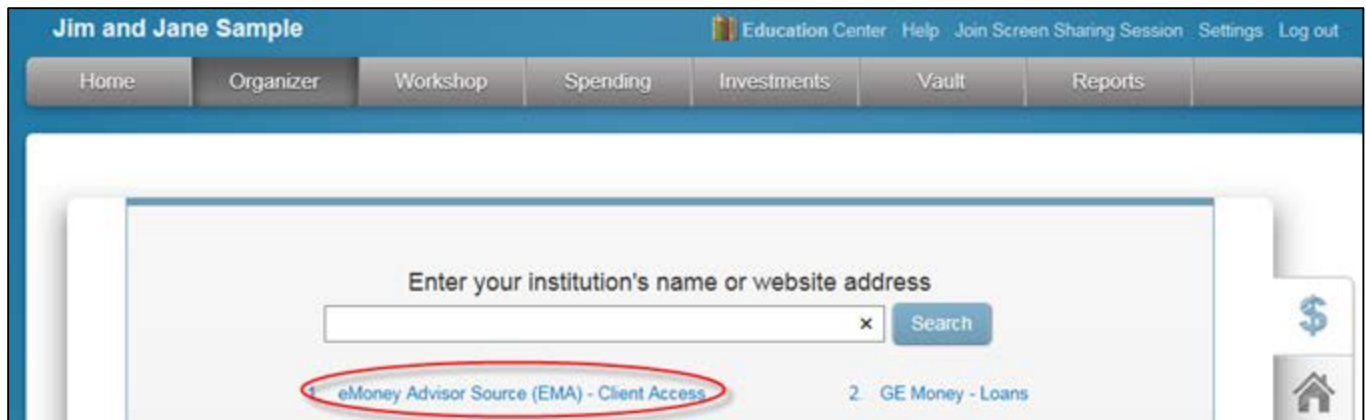
1 | Client Connections Booklet

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2. Enter the institution name or website address in the search bar and click **Search**.



3. From the list of results, select the correct institution.



2 | Client Connections Booklet

4. Enter your credentials and click **Connect**.

Connect to Institution ×

View an important message about this institution.

To connect to your accounts, enter your credentials below.

User Name

Password

Connect

Please note:

The system will take a moment to verify and retrieve your information.

Accounts + Add

6 Cash 6 Credit Cards 12 Investments 13 Insurance 3 Loans 3 Others

Verifying your credentials... ↻

wealth.emaplan.com

3 | Client Connections Booklet

5. The account values are pulled through onto the accounts page.

† Orion Investments	Taxable Investment	02/05/2015 10:44AM	\$40,249
† Permanent Life Insurance	Life Insurance - Variable Univers...	02/05/2015 10:44AM	\$14,500
Blue Credit Card	Loan - Credit Card	02/05/2015 10:44AM	-\$2,368
† Fidelity 401(k)	Qualified Retirement - Traditional...	02/05/2015 10:44AM	\$40,249
Stock Options	Stock Option	02/05/2015 10:44AM	\$1,239,505

6. To maintain the connection, see options in the upper right corner.



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