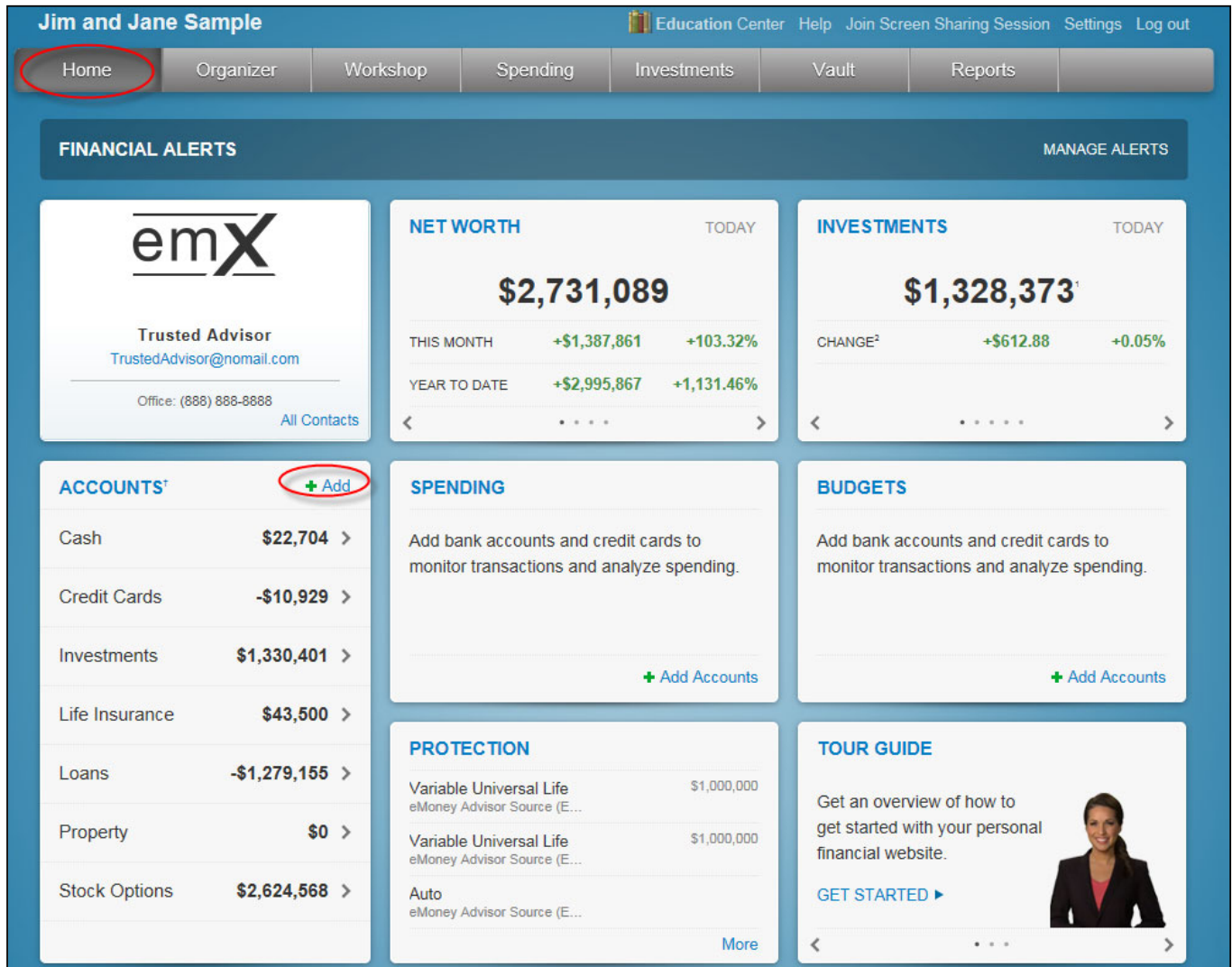


In this user guide we will demonstrate how to set up your Client Connections.

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

**emX**

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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<sup>1</sup>**

CHANGE<sup>2</sup> **+\$612.88** **+0.05%**

**ACCOUNTS<sup>†</sup>** + Add

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

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

[More](#)

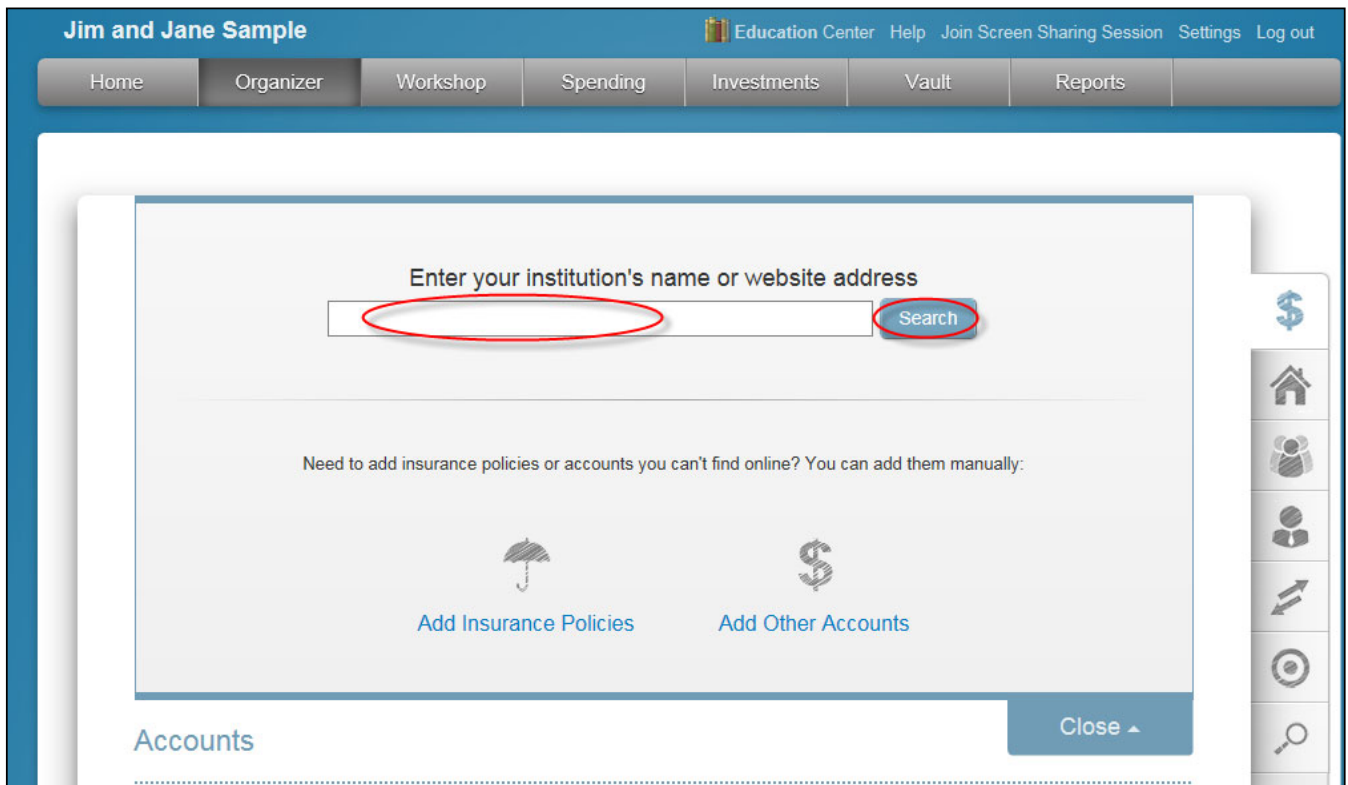
**TOUR GUIDE**

Get an overview of how to get started with your personal financial website.

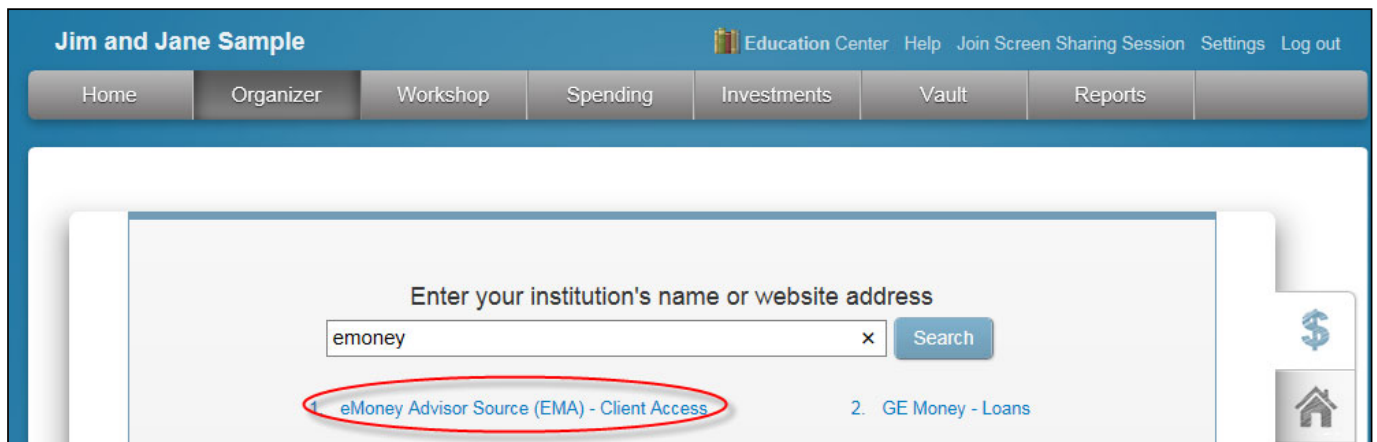
[GET STARTED ▶](#)



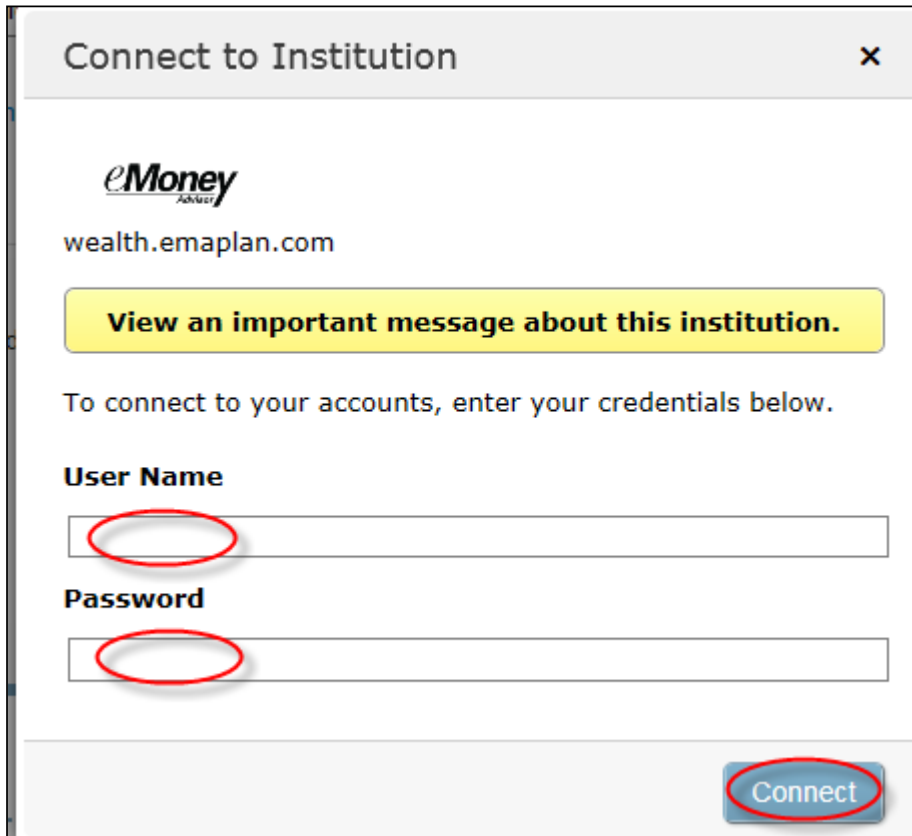
2. Enter the institution name or website address in the search bar and click **Search**.



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



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



**Connect to Institution** ✕

*eMoney*  
Advisor  
wealth.emaplan.com

**View an important message about this institution.**

To connect to your accounts, enter your credentials below.

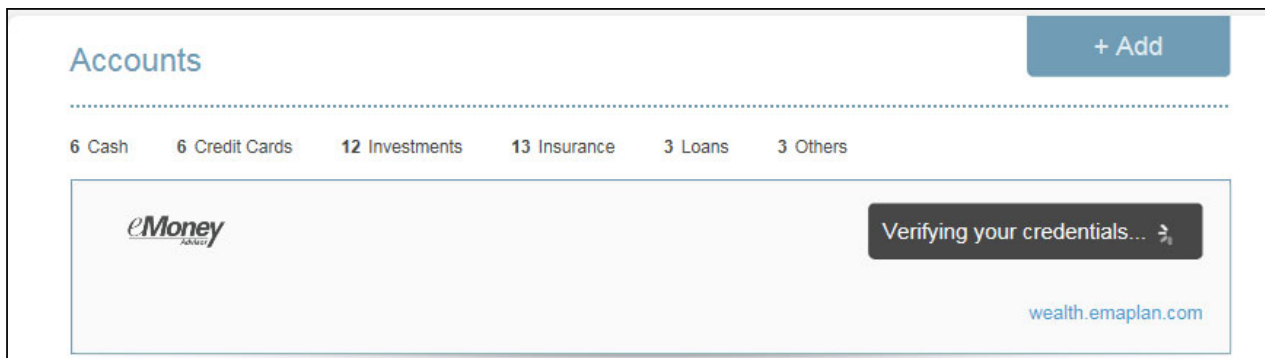
**User Name**

**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

*eMoney*  
Advisor

Verifying your credentials... ⌂

wealth.emaplan.com

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.





## Accounts

+ Add

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8 Cash   8 Credit Cards   15 Investments   19 Insurance   4 Loans   4 Others



 delete
 settings
 find new
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