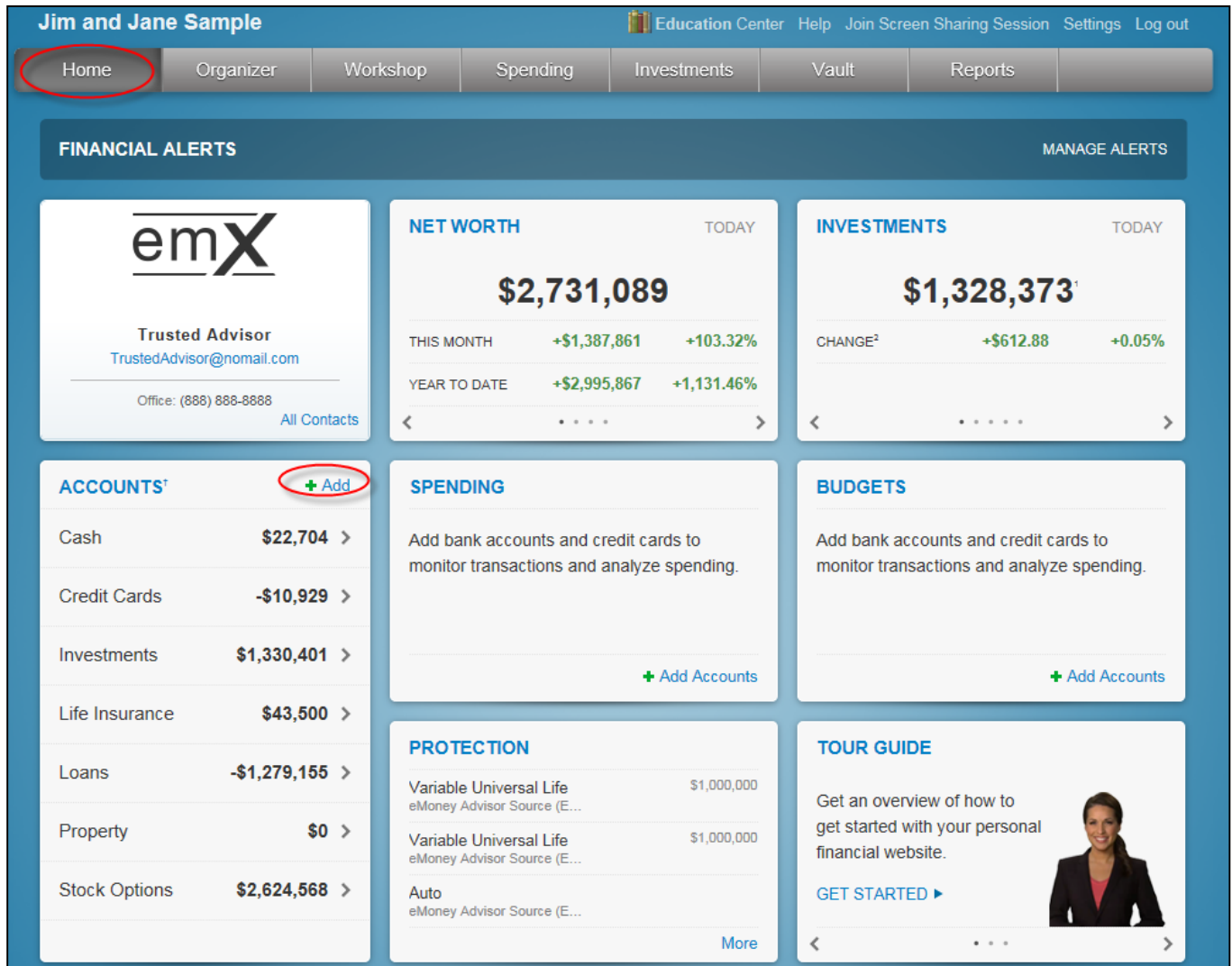


In this user guide we will demonstrate how to set up your Client Connections.


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



Trusted Advisor
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NET WORTH TODAY

\$2,731,089

THIS MONTH	+\$1,387,861	+103.32%
YEAR TO DATE	+\$2,995,867	+1,131.46%

INVESTMENTS TODAY

\$1,328,373¹

CHANGE ²	+\$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](#)

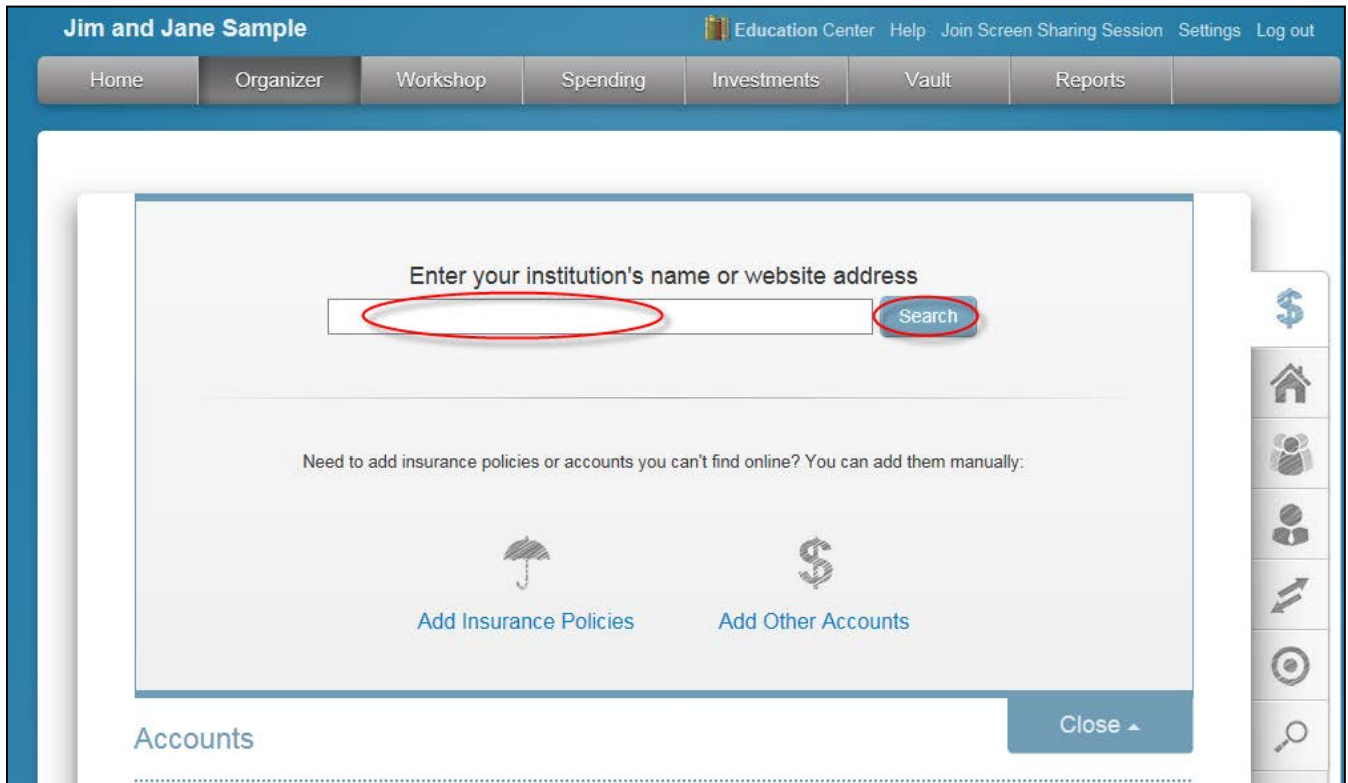
TOUR GUIDE

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

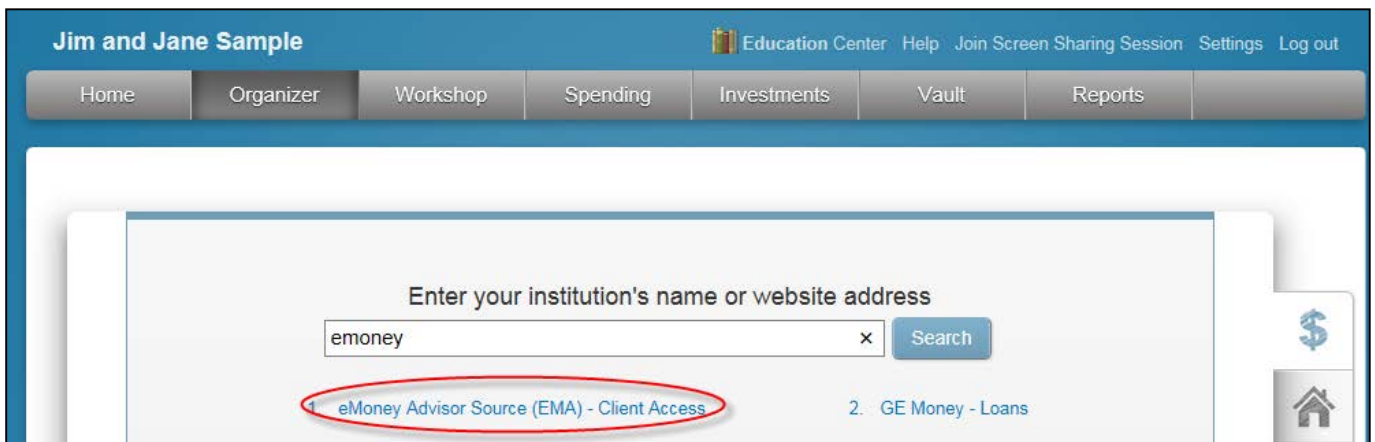
[GET STARTED ▶](#)



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 ✕


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

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

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



 delete
 settings
 find new
 refresh