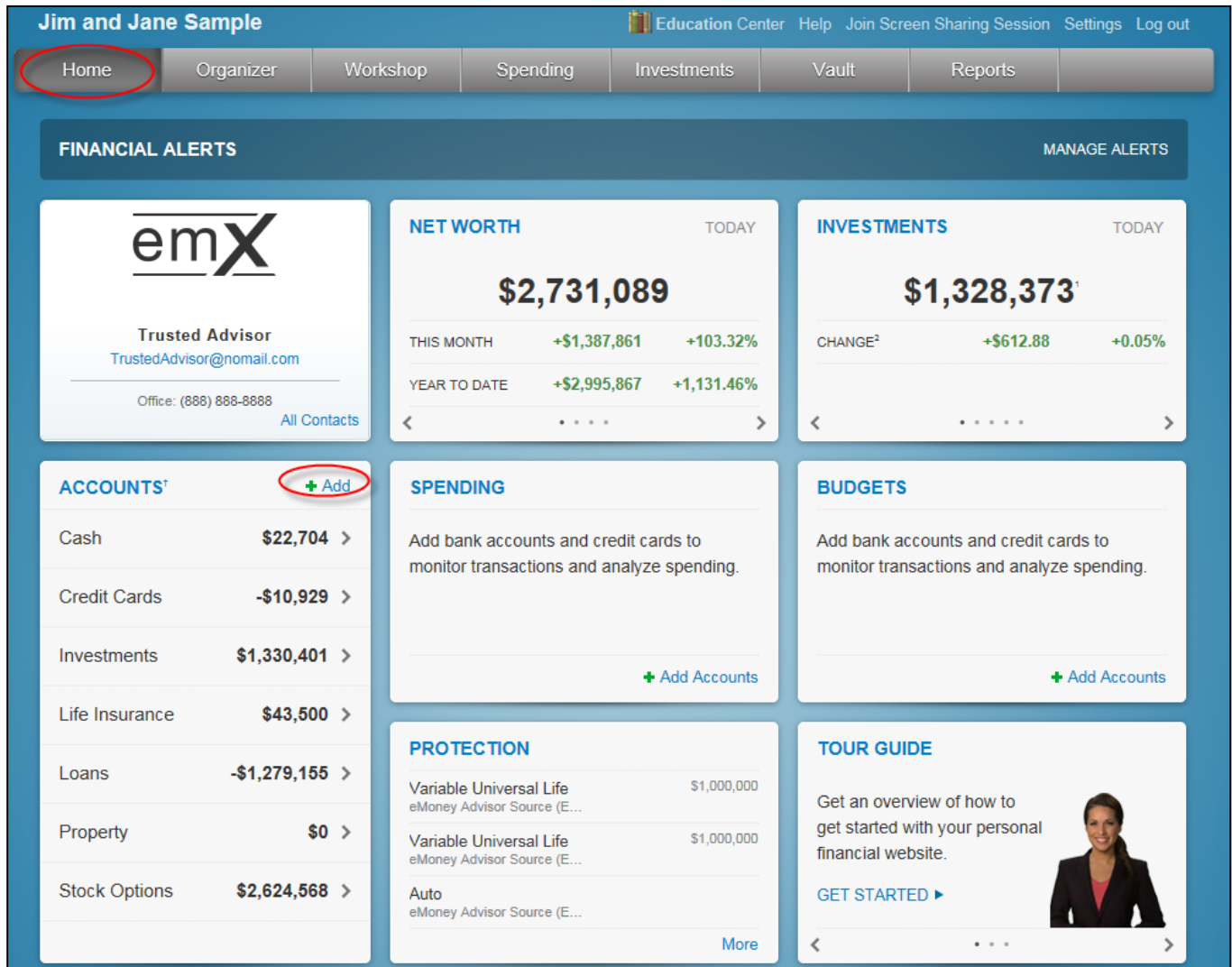


In this user guide we will demonstrate how to set up your Client Connections.

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

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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  
**\$1,328,373<sup>1</sup>**  
CHANGE<sup>2</sup> +\$612.88 +0.05%

**ACCOUNTS<sup>†</sup>** **+ 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**

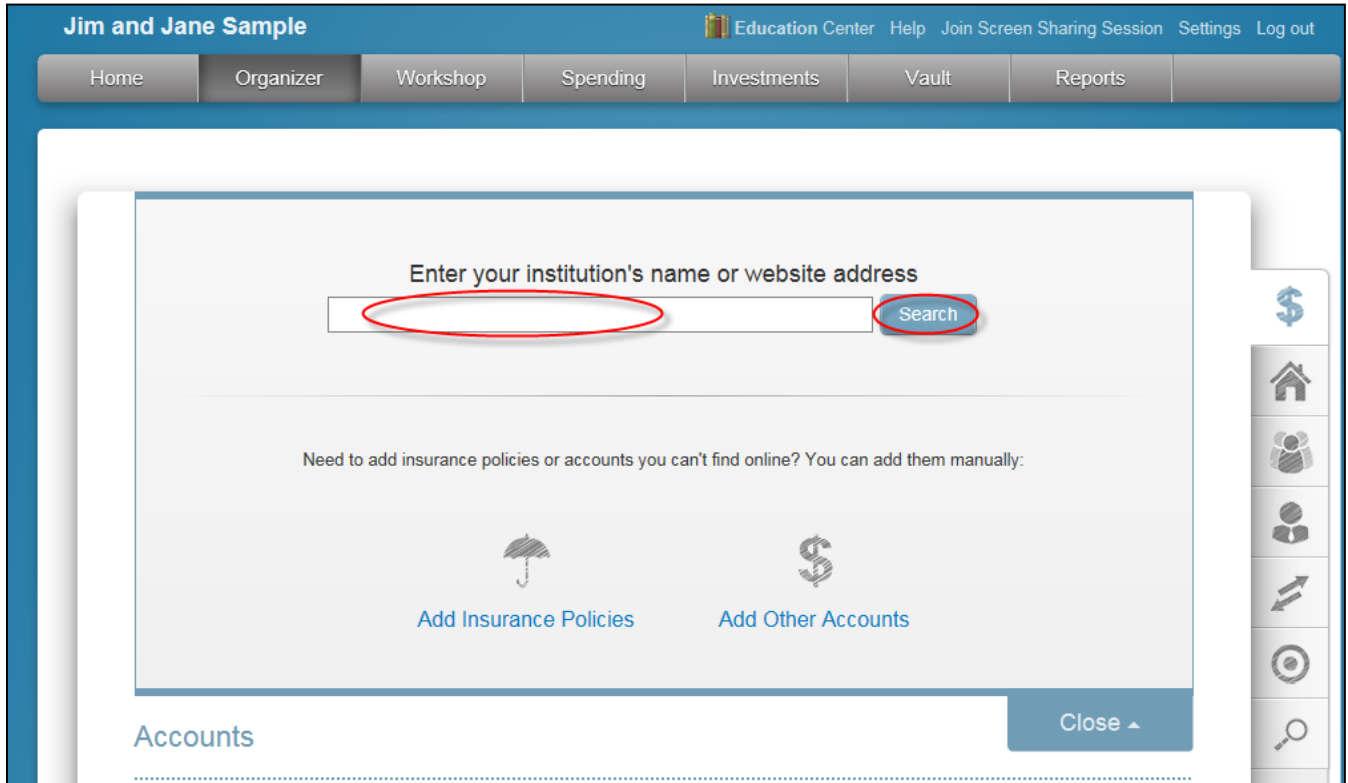
**BUDGETS**  
Add bank accounts and credit cards to monitor transactions and analyze spending.  
**+ Add Accounts**

**PROTECTION**

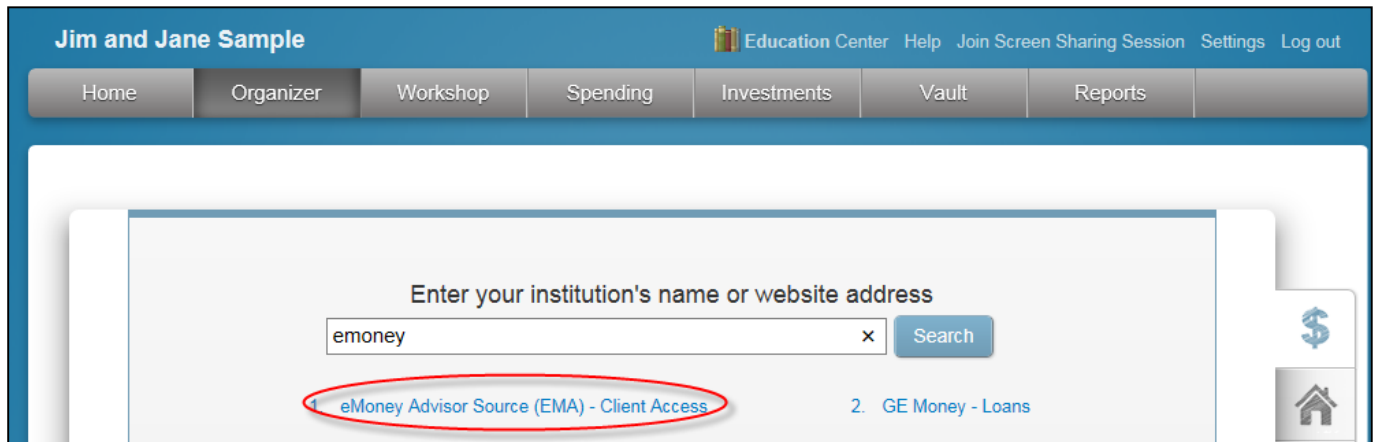
Variable Universal Life eMoney Advisor Source (E...	\$1,000,000
Variable Universal Life eMoney Advisor Source (E...	\$1,000,000
Auto eMoney Advisor Source (E...	

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

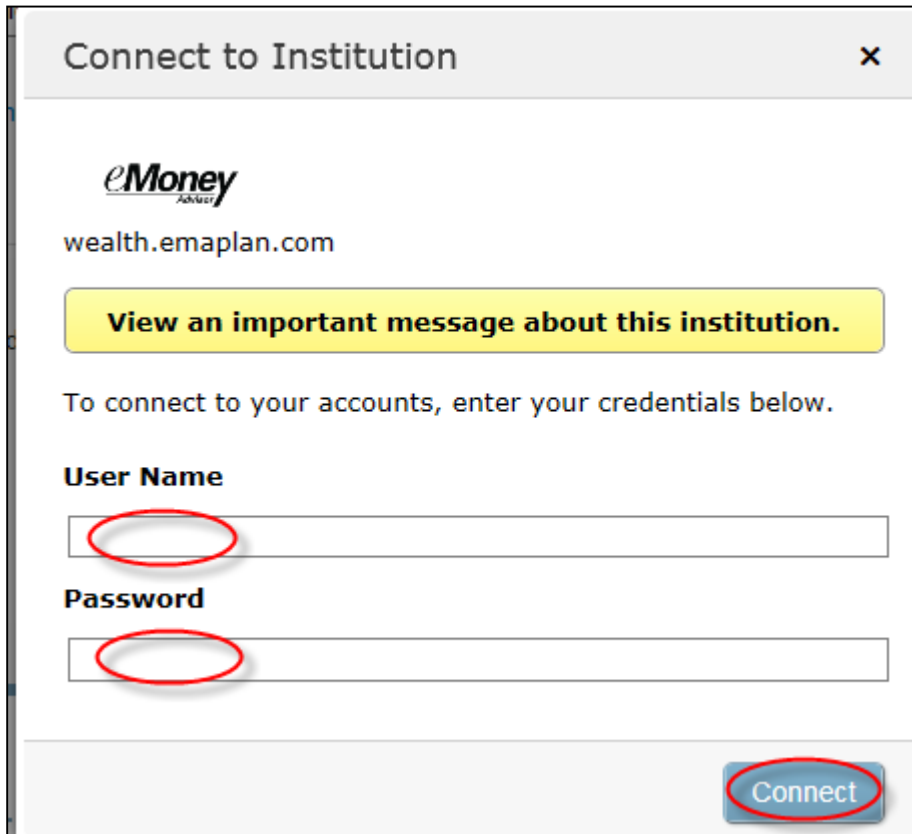
2. Enter the institution name or website address in the search bar and click **Search**.



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



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



**Connect to Institution** ✕

*eMoney*  
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wealth.emaplan.com

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

To connect to your accounts, enter your credentials below.

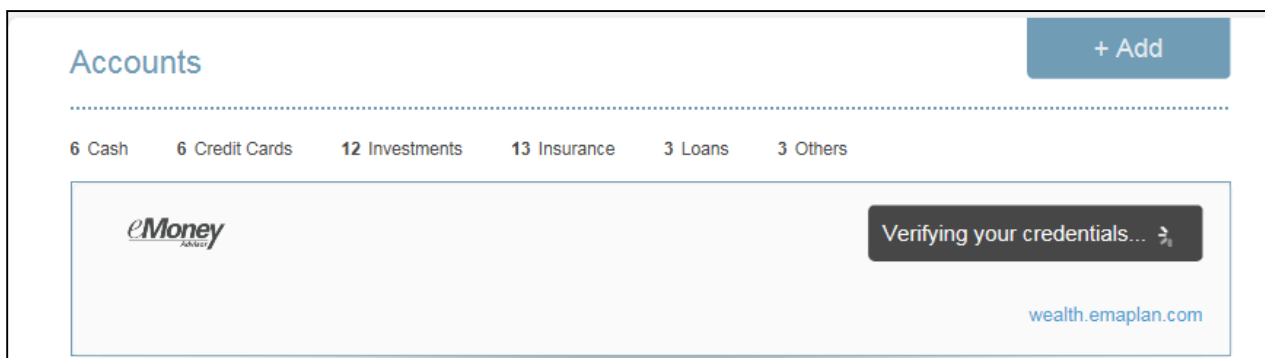
**User Name**

**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... ↻

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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
 refresh