

Website Overview

This training guide will overview your new website! This Personal Financial Management site provides you with the tools to organize your financial life. Using this wealth management portal will help you stay connected with your finances in one simple consolidated view.

Before your first login, you will be prompted to establish 3 security questions.

1. From your financial Home page, you will notice a tour guide in the bottom right tile. These brief videos will walk you through the different areas of this portal.

The screenshot displays the eMoney Advisor Home page. The navigation bar includes Home, Organizer, Workshop, Spending, Investments, Vault, Reports, Help, Settings, and Sign Out. The main content area is divided into several tiles:

- Profile:** Hannah Pou, hannahp@emoneyadvisor.com, Office: (888) 362-8482, All Contacts.
- NET WORTH:** TODAY \$2,098,887. THIS MONTH -- --.
- INVESTMENTS:** TODAY \$268,171. CHANGE² +\$737.99 +0.28%.
- ACCOUNTS:** + Add. Cash \$7,568 >, Credit Cards -\$2,368 >, Investments \$186,067 >, Life Insurance \$14,500 >, Loans -\$426,385 >, Property \$1,080,000 >, Stock Options \$1,239,505 >.
- SPENDING:** NET -\$1,994. You've spent \$1,994 this month. Pie chart showing Taxes, Cash/ATM, and Food. More >.
- BUDGETS:** Automatically create a budget based on your recent spending averages. Create a Budget >.
- PROTECTION:** Variable Universal Life \$1,000,000. eMoney Advisor Source (E...). More >.
- TOUR GUIDE:** Get an overview of how to get started with your personal financial website. GET STARTED > (highlighted with a red circle).

Your **Home** page is a living snapshot of your financial wellbeing. The Home page is a high-level view of your financial information. This page is divided into separate tiles that represent the information contained within a particular section of the application.

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- The **Organizer** will help you to consolidate all of your important financial information into one place. Click the different sections to add and edit the related information. Here you can add your accounts, financial data, people and property.

The screenshot displays the 'emX' website interface, specifically the 'Organizer' section. The top navigation bar includes 'Home', 'Organizer', 'Spending', 'Investments', 'Vault', 'Reports', 'Help', 'Settings', and 'Sign Out'. The main content area is divided into several sections:

- Accounts:** A sidebar menu with options: Accounts, Professional Contacts, Income, Expenses, and Savings, Future Goals, Financial Priorities, and Risk Tolerance.
- User Profiles:** Two profiles are shown: Charles Buckingham (CB) and Kristine Buckingham (KB). Charles's profile includes a phone number (610) 555-1313, email hannahp@emoneyadvisor.com, birthdate 3/19/1960, and title 'Owner at Buckingham Engineering'. Kristine's profile includes a phone number (610) 555-1414, email KBuckingham@mlh.org, birthdate 5/30/1963, and title 'Bryn Mawr Hospital'.
- People:** A section with a title 'People' and an 'Add Person' button. It features two circular avatars: Adam (AB) and Jack (JB).
- Property:** A section with a title 'Property' and an 'Add Property' button. It displays five property cards: 'Artwork and Jewelry' (purple background, diamond icon), 'Bryn Mawr Home' (green background, house icon), 'Buckingham Engineering' (orange background, building icon), 'Cars and Household Furnishings' (purple background, diamond icon), and 'Ocean City Condo' (green background, house icon).

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- The **workshops** page can help you take a closer look at your retirement strategy, insurance protection, and education goals. Select a workshop and before you begin, verify you've completed the appropriate organizer sections.

eMoney Home Organizer **Workshop** Spending Investments Vault Reports Help Settings Sign Out

Getting Started with **Financial Workshop**

play video

2051 Nancy is 81 Funding runs out 20 of 20 years fundi

Are your investments properly **allocated**? **new**

Are your personal **finances** balanced? **new**

Are you saving enough for retirement? **new**

Is your **family** protected? **new**

Are you saving enough for college? **new**

want to **learn more?**

Get more info on these topics: [view all](#)

- [Saving for College](#)
- [My Legacy](#)
- [Insurance](#)
- [Investing Essentials](#)
- [Personal Finance](#)
- [Retirement Planning](#)

Are you saving enough for retirement?

1 Intro 2 Your Strategy 3 Next Steps back to workshop

RETIREMENT

0:00:00

Take a look at your retirement strategy.

Find out how much your retirement will cost and see if you're on track to afford it.

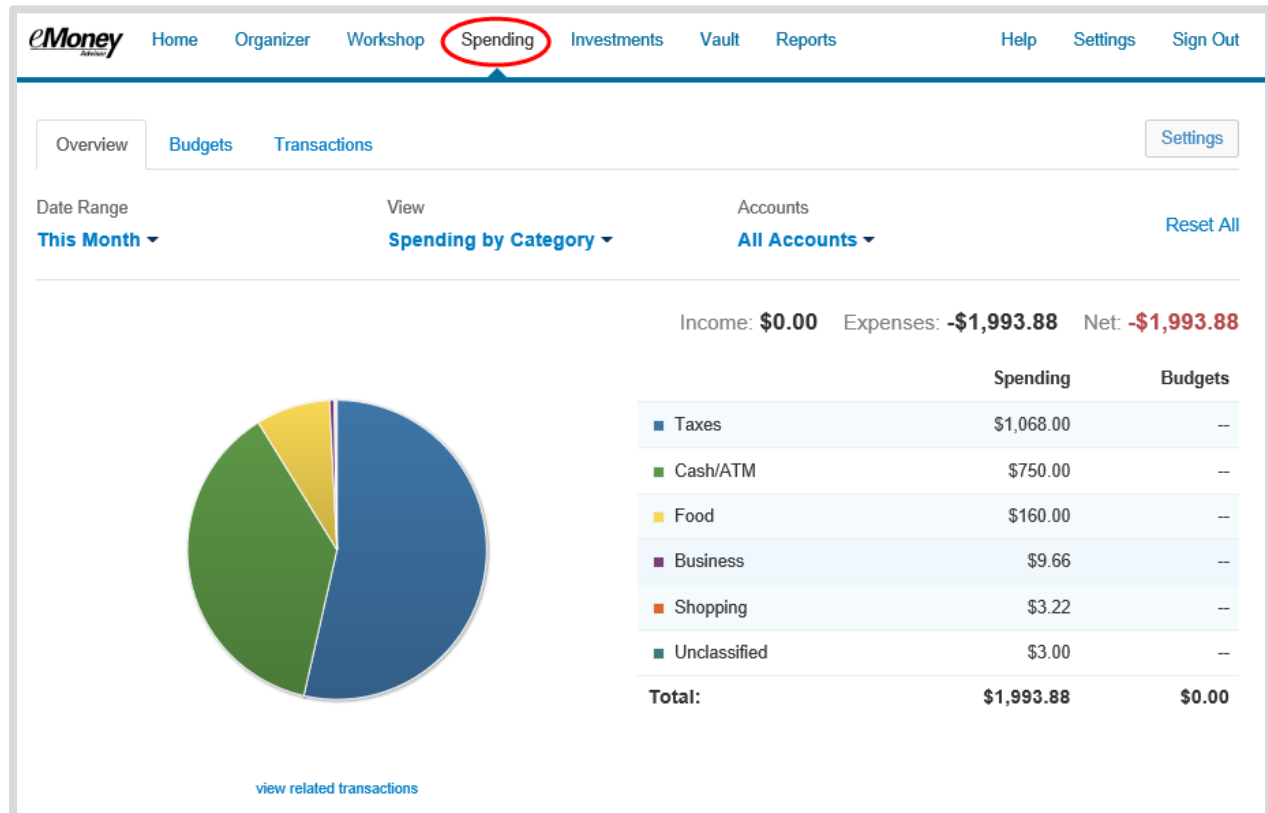
Before you begin
make sure these Organizer sections are complete:

- [Accounts](#)
- [Family and Friends](#)
- [Income, Expenses, and Savings](#)

Begin

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4. The **Spending** tab gives you a clear view of what you're spending each month. If there is no information on this screen, it's because a bank account or credit card needs to be added to Accounts in your Organizer. Spending includes an Overview tab, Budgets tab, and Transactions tab. Use these pieces together to create the most accurate view of your spending and your current budget.



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5. The **investments** tab is made up of four components: Summary, Allocation, Analysis, and Transactions. These will provide you with an overall view of your investments as well as the ability to drill into individual accounts & asset breakdowns.

Accounts
All Investments

¹Current Value: **\$268,171.04**
 Cash: \$7,680.00
 Margin: \$1.00
²Holdings: \$260,490.04
²Today's change: **+\$737.99** ↑ **0.28%**

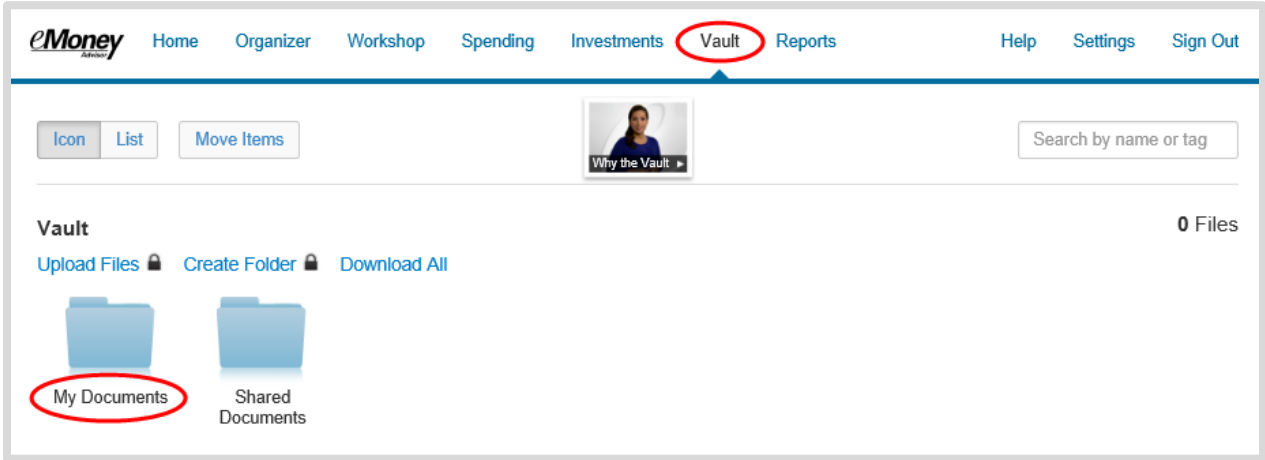
Cash, Margin, and Holding quantities reflect changes through the Positions As Of dates below ¹.
 Account holdings reflect the last available prices as of 05/10/2016 06:38AM ².

Balance History
 The selected account(s) don't have enough balance history data to chart.

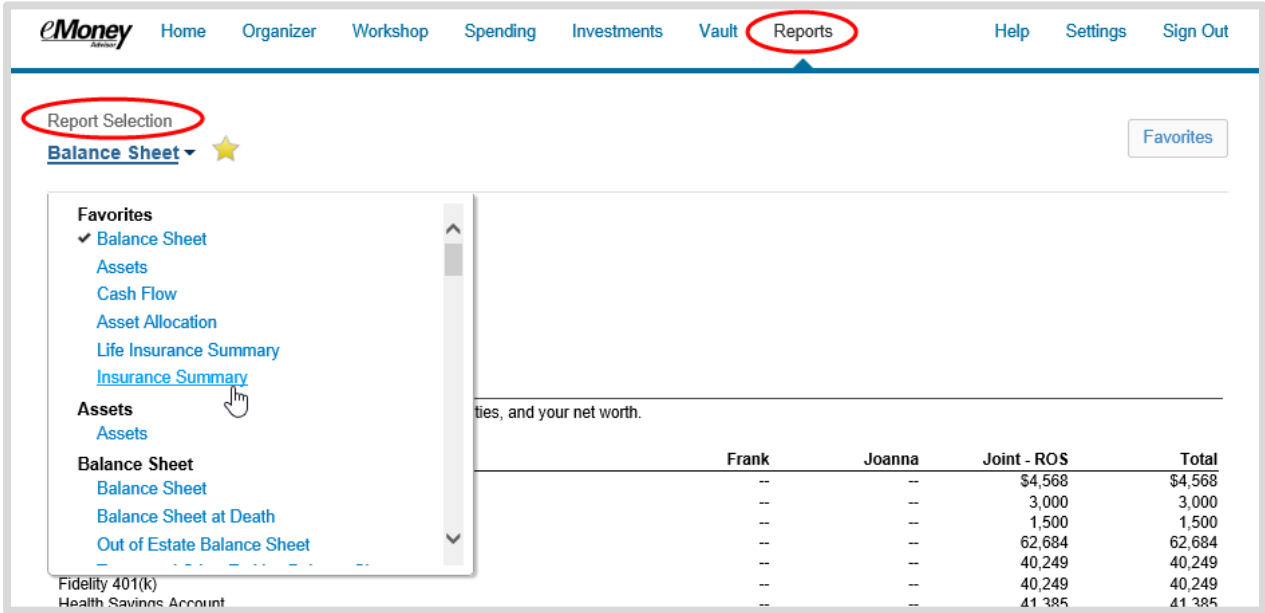
Account ▲	Positions As Of ¹ ↕	Cash ↕	Margin ↕	Holdings ² ↕	Current Value ↕	Today's Change ²	
						Value ↕	Pct ↕
† Any Account Type	05/10/2016 08:03AM	\$1,500.00			\$1,500.00		
† Fidelity 401(k)	05/10/2016 08:03AM	\$90.00		\$58,932.39	\$59,022.39	+\$32.00	0.05%
Fidelity Brokerage	05/10/2016 08:03AM	\$5,000.00	\$1.00	\$95,614.73	\$100,615.73	+\$673.99	0.67%
Health Savings Account	05/10/2016 08:03AM	\$1,000.00		\$47,010.53	\$48,010.53		
† Orion Investments	05/10/2016 08:03AM	\$90.00		\$58,932.39	\$59,022.39	+\$32.00	0.05%
† Taxable Investment	05/10/2016 08:11AM				\$0.00		
Total					\$268,171.04	+\$737.99	

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6. The **Vault** tab is a repository which files are stored by your advisor for your review, and where you can store files. To upload a file, click the **Upload Files** link. The **My Documents** folder is hidden from your advisor. If you want your advisor to see a document, upload into the **Shared Documents** folder.



7. The **Reports** tab provides you with a series of reports about your financial situation.



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8. The **Settings** page is where you can set up alerts, update your security information (passwords & questions), and permission your advisor to see spending information through the Privacy tab.

