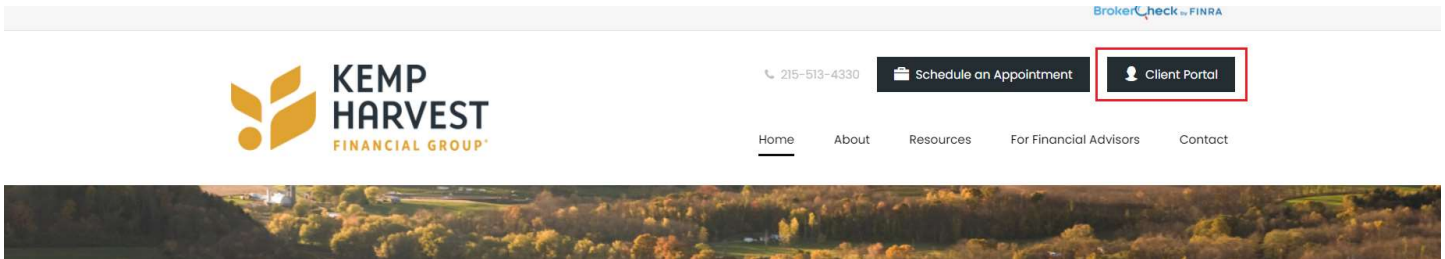


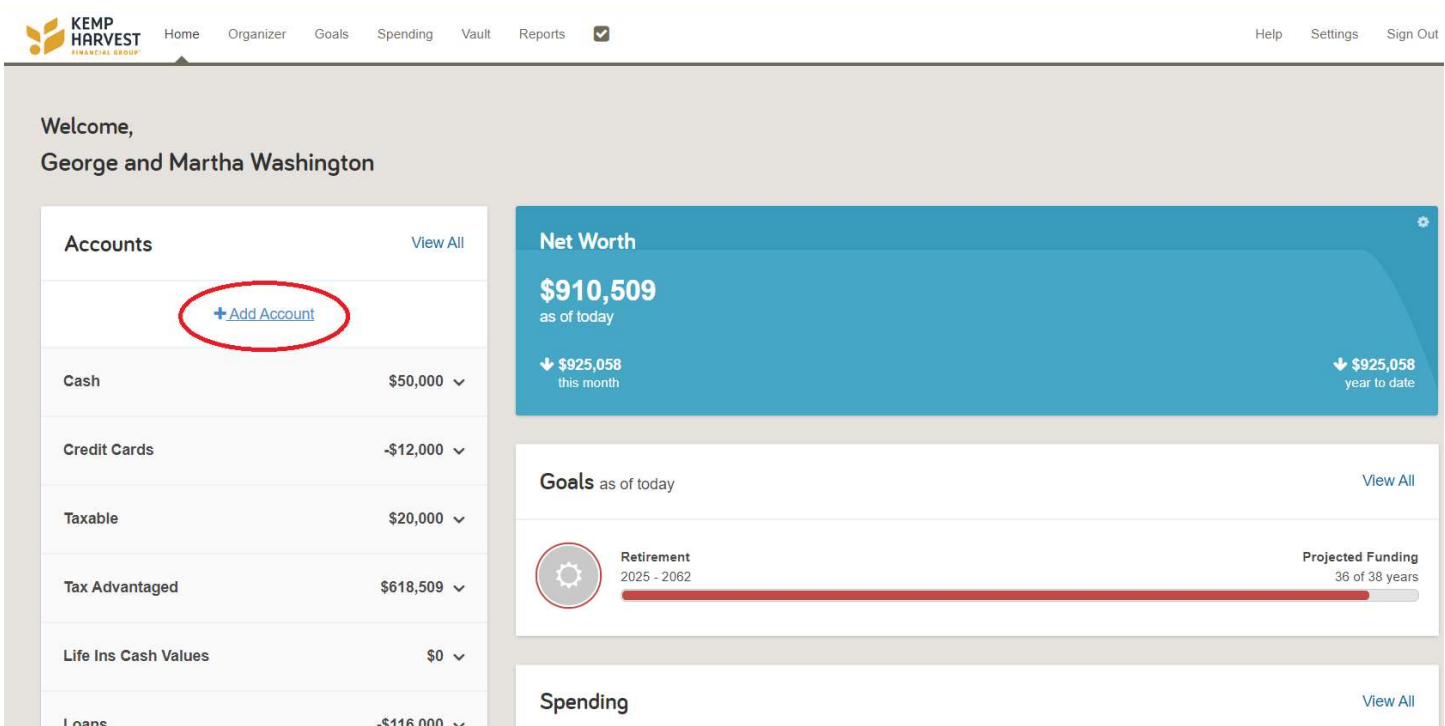
Client Portal Instructions: Connecting Your Accounts

Should you need any assistance, call us at 215-513-4330.

1. Login to your client portal. Visit <https://www.kempharvest.com>, click on the blue **Client Portal** button in the top right, then Click here to proceed.



2. From your Home Page, click **+ Add Account**.



3. Select whether or not you have an online login for this account. If you do not have an online login for this account, the application will help you add the accounts manually (see Page 4).

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[Go back to Home](#)

Add Accounts

Do you have an online login to your account's institution?

I have an online login to this account

I don't have an online login to this account

[Cancel](#)

4. Enter the institution's name or website address and click **Search**.

[Go back to Home](#)

Add Accounts

Enter your institution's name or website address

example "My Bank" or "www.mybank.com"

Search

Can't find your institution?

Some accounts don't have online access. To add those accounts, you will need to use a form to fill out the information.

[Help me add my account](#)

[Need help with connections?](#)

[Previous Step](#)

[Cancel](#)

5. From the search results found, select the appropriate link.

[Go back to Home](#)

Add Accounts

Enter your institution's name or website address

eMoney

Search

Search results (1 matches found)

1. [eMoney Advisor Source \(EMA\) - Client Access](#)

Can't find your institution?

Some accounts don't have online access. To add those accounts, you will need to use a form to fill out the information.

[Help me add my account](#)

[Need help with connections?](#)

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6. Next you will acknowledge the institution notice where applicable. This notice will inform you of any important information relating to this institution's connection. Click **Continue**.

[Go back to Home](#)

Add Accounts

Acknowledge Institution Notice

This connection should be used to demonstrate establishing a Client Connection. The current screen is designed to:

- Educate users on any known maintenance issues
- Explain any unique setup steps for the connection
- Explain why accounts are not updating during certain time periods
- Other connection-specific information

Users should review this section prior to calling or reporting a problem on a connection error. Please note, this demo connection can be removed at any time.

Source Purpose

The purpose of this source is to demonstrate establishing a Client Connection.

Status Screen Summary

The current screen will be used on any source in the eMoney Advisor system. It is designed to fulfill one of the following:

- Educate users on any known maintenance issues.
- Explain any unique set-up steps for a source
- Explain why accounts are not updating during certain time periods
- Other source specific information

Please instruct the users to review this section prior to calling or reporting a problem on a Connection that is in error. Please note, a connection to this test source may be removed at any time.

Continue

[Previous Step](#)

[Cancel](#)

7. Enter your login credentials for this institution and click Connect. If there's an issue connecting to your accounts, you'll receive a status message describing the problem. Click on the message to learn how to fix it.

[Go back to Home](#)

Add Accounts

eMoney

wealth.emaplan.com

To connect to your accounts, enter your credentials below.

User Name

eMoney

Password

Connect

[Previous Step](#)

[Cancel](#)

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8. Once your credentials have been verified, you can review the connected accounts. Click **Continue** to return to an overview of all accounts you've entered into your portal.

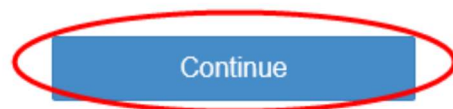
[Go back to Accounts](#)
Add Accounts



✔ You've successfully connected to eMoney Advisor Source (EMA) - Client Access!

You can review your new accounts below. To return to the full list, click continue.

Mortgage	Mortgage - Mortgage	-\$426,385
Blue Credit Card	Loan - Credit Card	-\$2,368
Stock Options	Stock Option	\$1,239,505
† Orion Investments	Taxable Investment	\$40,249
Health Savings Account	Health Savings Account	\$41,385
† Default Account Type	Taxable Investment	\$1,000
† Any Account Type	Taxable Investment	\$1,500



If you do not have an online login, follow these steps to enter accounts manually.

1. Click **+ Add Account** on the Accounts page.

Home Organizer Goals Spending Vault Reports Help Settings Sign Out

Welcome,
George and Martha Washington

Accounts [View All](#)

[+ Add Account](#)

Cash \$50,000

Credit Cards -\$12,000

Taxable \$20,000

Tax Advantaged \$618,509

Life Ins Cash Values \$0

Loans -\$116,000

Net Worth
\$910,509
as of today
↓ \$925,058 this month ↓ \$925,058 year to date

Goals as of today [View All](#)

Retirement 2025 - 2062 Projected Funding 36 of 38 years

Spending [View All](#)

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2. Select "I don't have an online login to this account."

[Go back to Home](#)

Add Accounts

Do you have an online login to your account's institution?

I have an online login to this account

I don't have an online login to this account

[Cancel](#)

3. Select the type of account.

[Go back to Home](#)

Add Accounts

What type of account is this?

Cash

Investment

Insurance

Liability

Stock Option

Note Receivable

i Accounts added from here will not be automatically updated.

[Previous Step](#)

[Cancel](#)

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4. Select additional details about your account. (This list will vary depending on the type of account you selected.)

[Go back to Home](#)

Add Accounts

What type of investment is this?

529 Plan

529 Plan

Annuity

Fixed
Variable

Deferred Compensation

Deferred Compensation

Health Savings Account

Health Savings Account

Qualified Retirement

IRA
Money Purchase
Other
Pension
Profit Sharing
Roth 401(k)
Roth 403(b)
Roth SEP
SEP
Traditional 401(k)
Traditional 403(b)

Roth IRA

Roth IRA

Taxable Investment

Taxable Investment

Accounts added from here will not be automatically updated.

[Previous Step](#) [Cancel](#)

5. Enter the account details and click **Save**.

[Go back to Home](#)

Qualified Retirement

Asset Name	<input type="text" value="George's IRA"/>
Institution Name	<input type="text" value="1776 Bank"/>
Type	<input type="text" value="IRA"/>
Owner	<input type="text" value="George Washington"/> Add
Beneficiary	<input type="text" value="Martha Washington"/> Add
Established Year	<input type="text"/>
Total Value	<input type="text" value="\$25,000"/>
Holdings Value	<input type="text"/>
Cash Balance	<input type="text"/>
Margin Balance	<input type="text"/>
Non-Roth Post-Tax Cost Basis	<input type="text"/>
Roth Value	<input type="text"/>
Roth Cost Basis	<input type="text"/>
	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

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