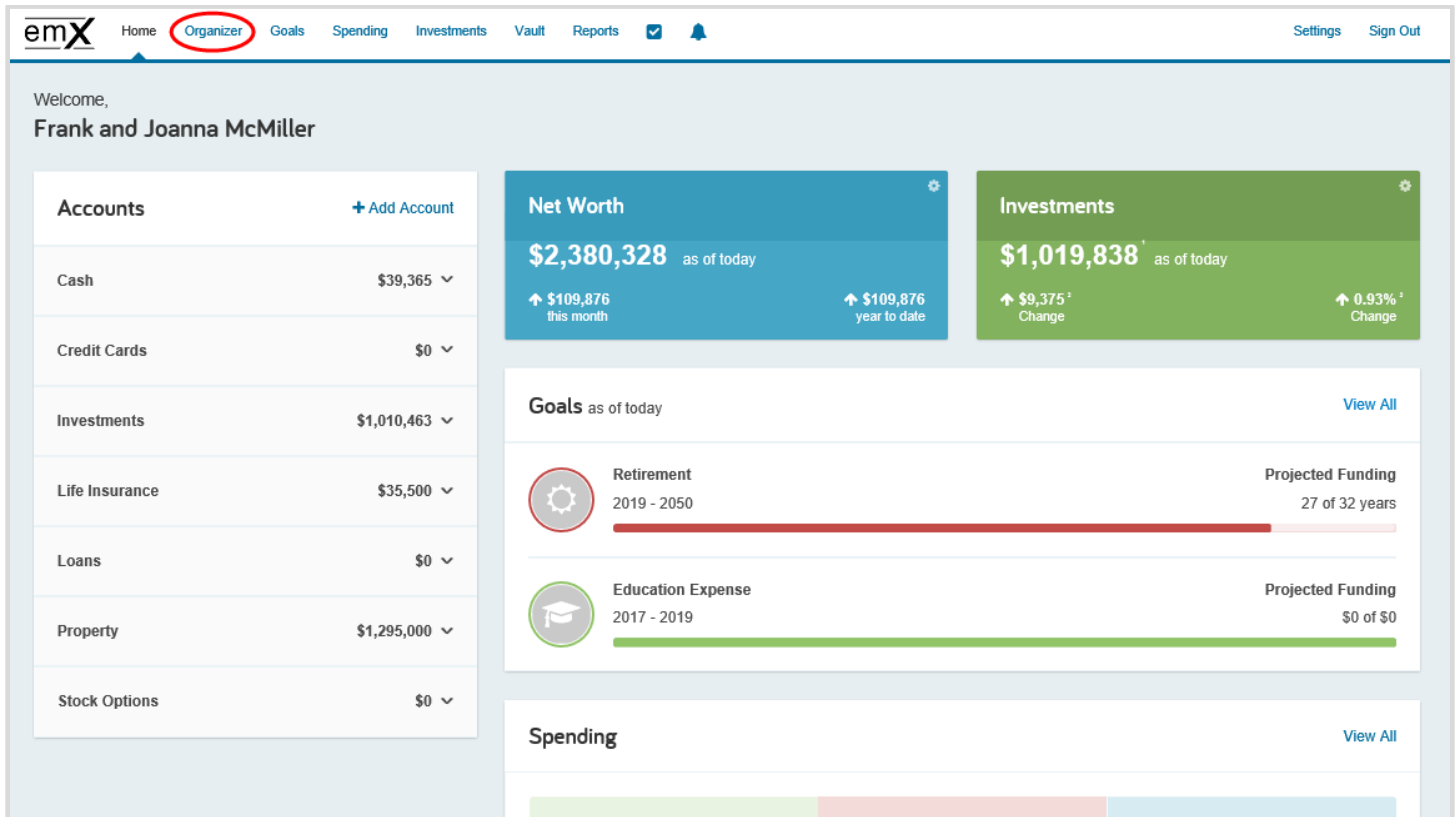


Add Accounts

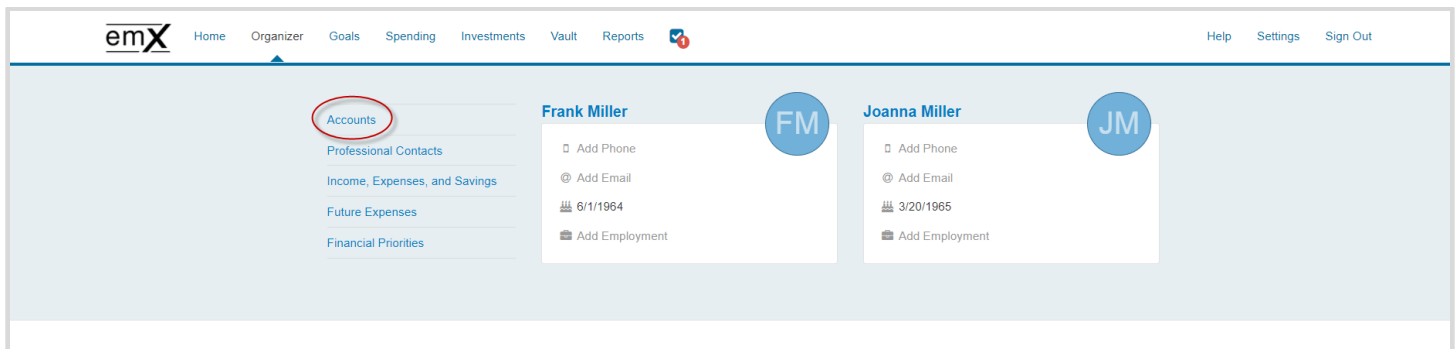
In this userguide, we will demonstrate how to establish a connection with your personal banking institutions. A connection is a direct link with an institution that feeds over updated account information.

1. From your home page, click **Organizer**.



You can also click the **+Add Account** link directly from the Home page!

2. Click **Accounts**.



Add Accounts

3. Review the information on why you should add accounts, and what type of accounts you should add. Click **Add**.

Go back to Organizer

Accounts

[Add](#)

No accounts have been added yet.

Why should you add your accounts?

Adding your account connections is one of the most important steps toward establishing a holistic view of your financial picture. In doing so you benefit from:

- Account values that update automatically each night to give an accurate view of your current financial status.
- Access to all of your accounts, organized neatly in one place.
- 24/7 monitoring of your financial well-being.

What types of accounts should you add?

- Cash** – Including any checking, savings, or other cash accounts.
- Investments** – Including brokerage, 401(k), 529, etc.
- Credit Cards** – Any major credit or charge accounts.
- Loans** – All types of loans, including mortgage, home equity, auto, school, personal, etc.
- Life Insurance** – Including whole life, term life, group policies, etc.
- Property** – Including homes, businesses, cars, jewelry, and any other personal belongings of value.

Add Accounts

4. Select whether or not you have an online login for this account.

Please Note: If you do not have an online login for this account, the application will help you add the accounts manually.

The screenshot shows a web form titled "Add Accounts" with a "Go back to Accounts" link. The main question is "Do you have an online login to your account's institution?". There are two radio button options: "I have an online login to this account" (which is circled in red) and "I don't have an online login to this account". A "Cancel" link is located at the bottom of the form.

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

The screenshot shows the same "Add Accounts" form. The question "Do you have an online login to your account's institution?" is not visible. Instead, there is a text input field with the placeholder "Enter your institution's name or website address". A "Search" button is located to the right of the input field and is circled in red. Below the input field, there is a section titled "Can't find your institution?" with the text "Some accounts don't have online access. To add those accounts, you will need to use a form to fill out the information." and a "Help me add my account" button.

Add Accounts

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

Go back to Accounts

Add Accounts

Enter your institution's name or website address

Search results (1 matches found)

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

- 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 Accounts

Add Accounts

Acknowledge Institution Notice

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.

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.

Add Accounts

- Enter in 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 Accounts

Add Accounts



wealth.emaplan.com

To connect to your accounts, enter your credentials below.

User Name


Password

Connect

- Once your credentials have been verified you can review the accounts brought over through the connection. Click **Continue** to return to an overview of all accounts you have 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 |

Continue

Add Accounts

10. On the Accounts page you can easily see when your accounts with an institution last updated or if any accounts are in an errored state.

Go back to Organizer

Accounts Add

eMoney delete settings find new refresh

There is an important message about this institution. [Click to view](#)

| | | | |
|----------------------------|-------------------------------------|--------------------|-------------|
| Mortgage | Mortgage - Mortgage | 05/10/2016 09:03AM | -\$426,385 |
| Blue Credit Card | Loan - Credit Card | 05/10/2016 09:03AM | -\$2,368 |
| Stock Options | Stock Option | 05/10/2016 09:03AM | \$1,239,505 |
| * Permanent Life Insurance | Life Insurance - Variable Univer... | 05/10/2016 09:03AM | \$14,500 |
| * Easy 123 Checking | Cash Equivalent - Checking | 05/10/2016 09:03AM | \$4,568 |
| * Electric Orange | Cash Equivalent - Checking | 05/10/2016 09:03AM | \$3,000 |
| Fidelity Brokerage | Taxable Investment | 05/10/2016 09:03AM | \$62,684 |
| * Fidelity 401(k) | Qualified Retirement - Tradition... | 05/10/2016 09:03AM | \$40,249 |
| * Orion Investments | Taxable Investment | 05/10/2016 09:03AM | \$40,249 |
| Health Savings Account | Health Savings Account | 05/10/2016 09:03AM | \$41,385 |
| * Any Account Type | Taxable Investment | 05/10/2016 09:03AM | \$1,500 |

Connection last updated 05/10/2016 09:03AM wealth.emaplan.com

11. Each connection you establish will have its own specific maintenance required. For example, if you updated your password on the institution you will need to then update the credentials in your portal.

You can **Delete** the connection, **change your settings**, **find new accounts**, and **refresh** the connection at any time to pull over updated account values.

Go back to Organizer

Accounts Add

eMoney delete settings find new refresh

Add Accounts

12. The settings link gives you the option to enable your Advisor to find new accounts on your behalf.

SET ADVISOR PERMISSION ✕

Do you want your Advisor to be able to find accounts from **eMoney Advisor Source (EMA)** - **Client Access** in the future?

No, only I can find new accounts from this institution.

Yes, my Advisor can find new accounts from this institution.

Your advisor will have the ability to find newly available accounts as well as existing accounts you may have intentionally excluded.

Save

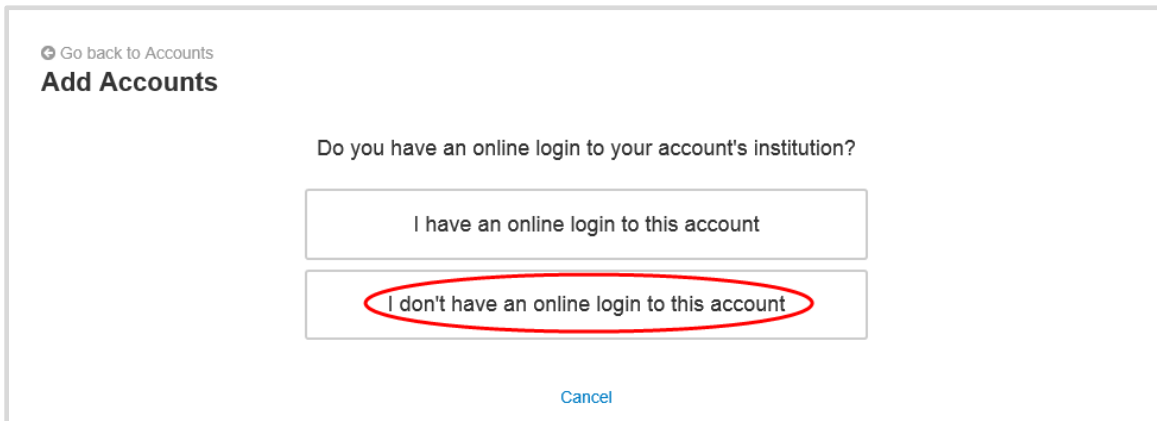
Add Accounts

If you do **not** have an online login to an institution, follow the below steps to enter accounts in manually. While manual accounts do NOT update, they help build a better financial snap shot for both you and your advisor.

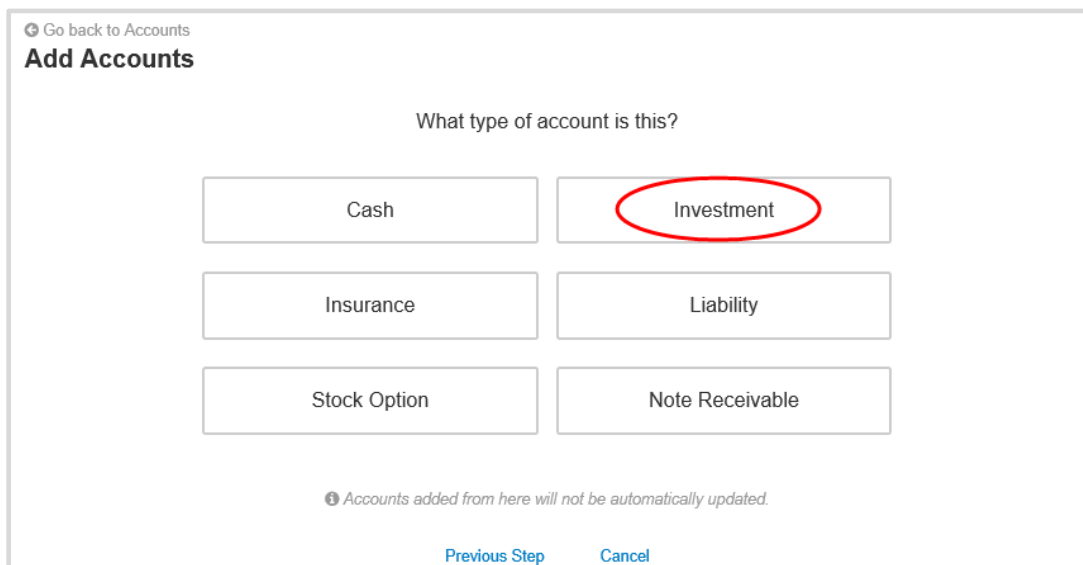
1. Click **Add** on the Accounts page.



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



3. Select the type of account.



Add Accounts

4. Enter details about the account and click **Save!**

[Go back to Accounts](#)

Taxable Investment

| | |
|------------------|---|
| Asset Name | <input type="text" value="Taxable Investment"/> |
| Institution Name | <input type="text" value="Joanna's Investment Account"/> |
| Owner | <input type="text" value="Joanna Miller"/> ▼ + Add |
| Total Value | <input type="text" value="\$33,000"/> |
| Holdings Value | <input type="text"/> |
| Cash Balance | <input type="text"/> |
| Margin Balance | <input type="text"/> |
| Tax Basis | <input type="text" value="\$27,500"/> |