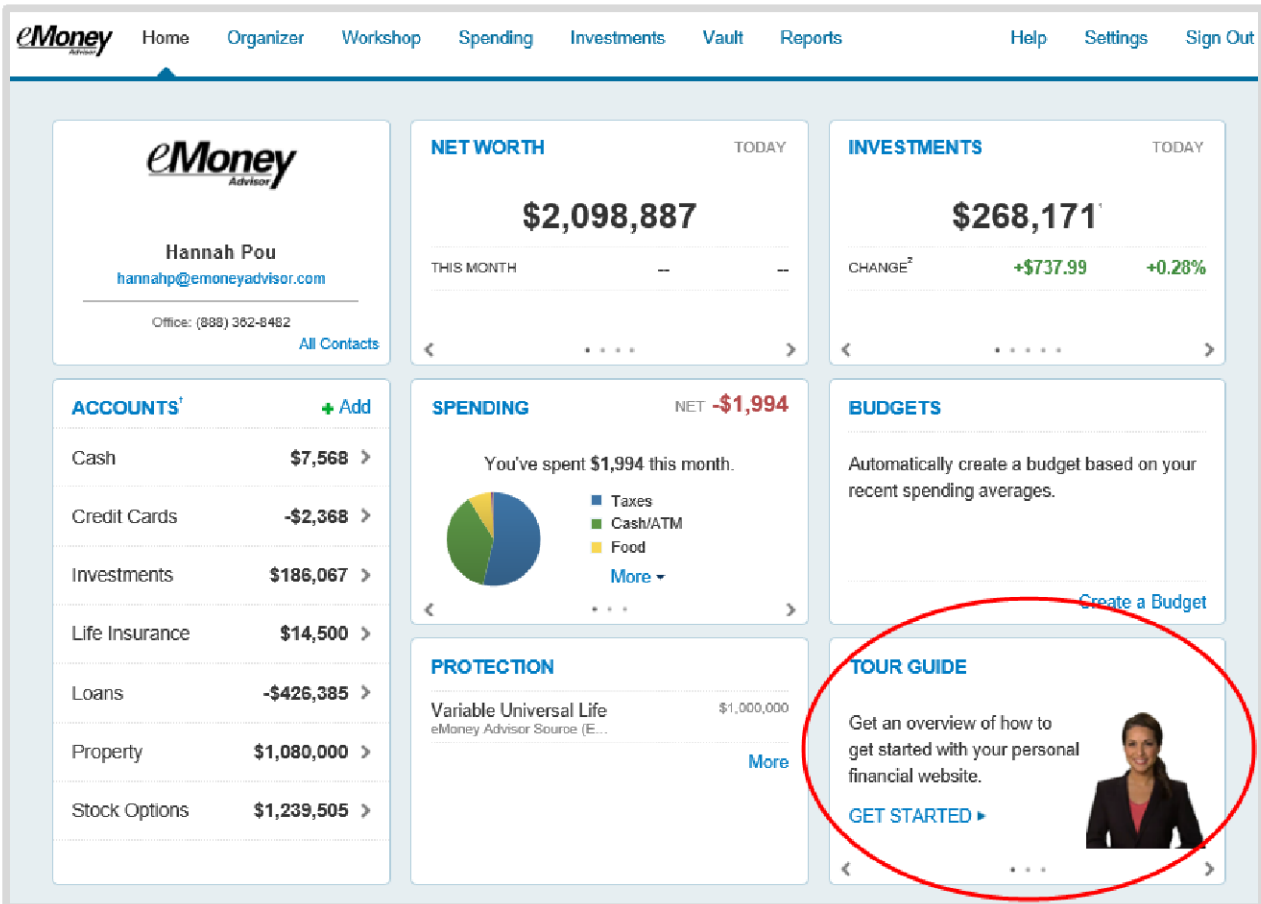


## Website Overview

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.

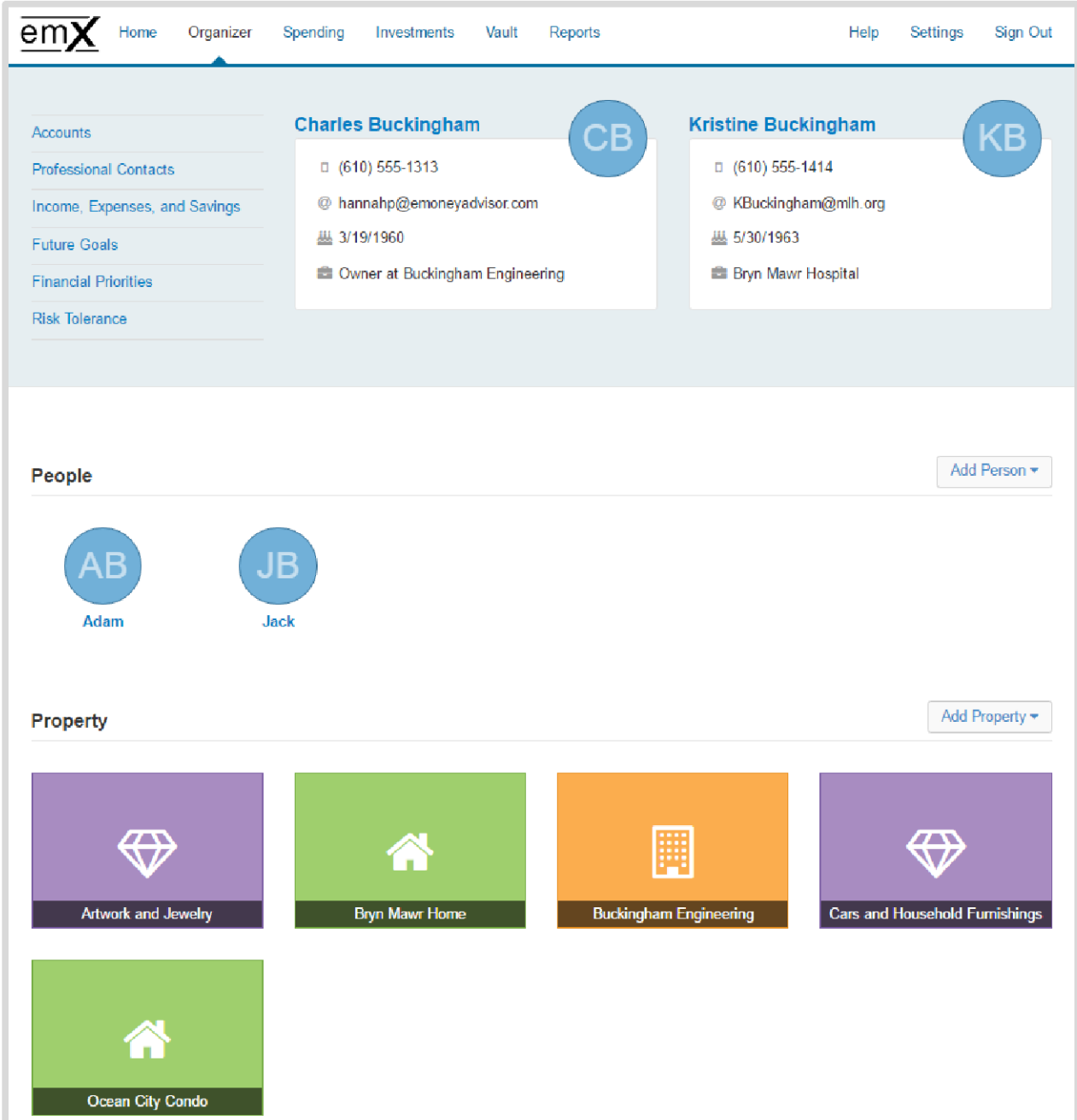
1. From your financial Home page, you will notice a tour guide in the bottom right tile. These brief videos will walk you through the different areas of this portal.



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.

## Website Overview

2. 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.




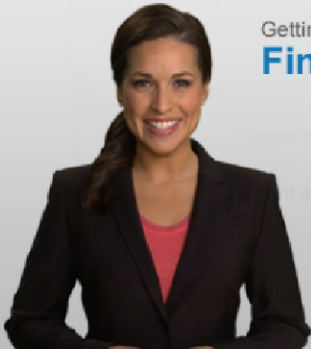
The screenshot displays the 'emX' website's 'Organizer' section. At the top, a navigation bar includes 'Home', 'Organizer', 'Spending', 'Investments', 'Vault', 'Reports', 'Help', 'Settings', and 'Sign Out'. A left sidebar lists categories: 'Accounts', 'Professional Contacts', 'Income, Expenses, and Savings', 'Future Goals', 'Financial Priorities', and 'Risk Tolerance'. The main content area features two user profiles: Charles Buckingham (CB) and Kristine Buckingham (KB). Charles's profile lists a phone number (610) 555-1313, email hannahp@emoneyadvisor.com, birth date 3/19/1960, and role as Owner at Buckingham Engineering. Kristine's profile lists a phone number (610) 555-1414, email KBuckingham@mlh.org, birth date 5/30/1963, and role as Bryn Mawr Hospital. Below these are sections for 'People' (with 'Add Person' button) showing Adam (AB) and Jack (JB), and 'Property' (with 'Add Property' button) showing Artwork and Jewelry, Bryn Mawr Home, Buckingham Engineering, Cars and Household Furnishings, and Ocean City Condo.

## Website Overview

3. 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.

## Website Overview



[Home](#)
[Organizer](#)
[Workshop](#)
[Spending](#)
[Investments](#)
[Vault](#)
[Reports](#)
[Help](#)
[Settings](#)
[Sign Out](#)



Getting Started with

### Financial Workshop

play video




Are your investments properly **allocated**?

Are your personal **finances** balanced?

Are you saving enough for **retirement**?

Is your **family** protected?

Are you saving enough for **college**?


 want to **learn more?**

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

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

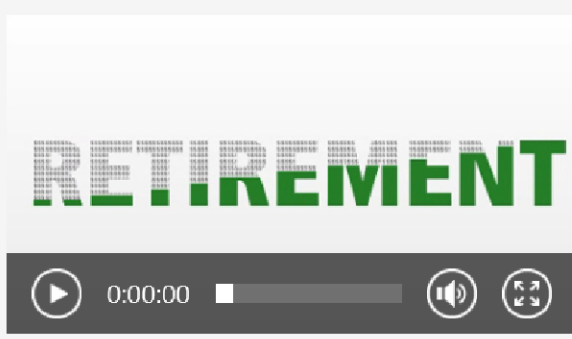
### Are you saving enough for retirement?

**1** Intro

**2** Your Strategy

**3** Next Steps




[back to workshop](#)



**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.

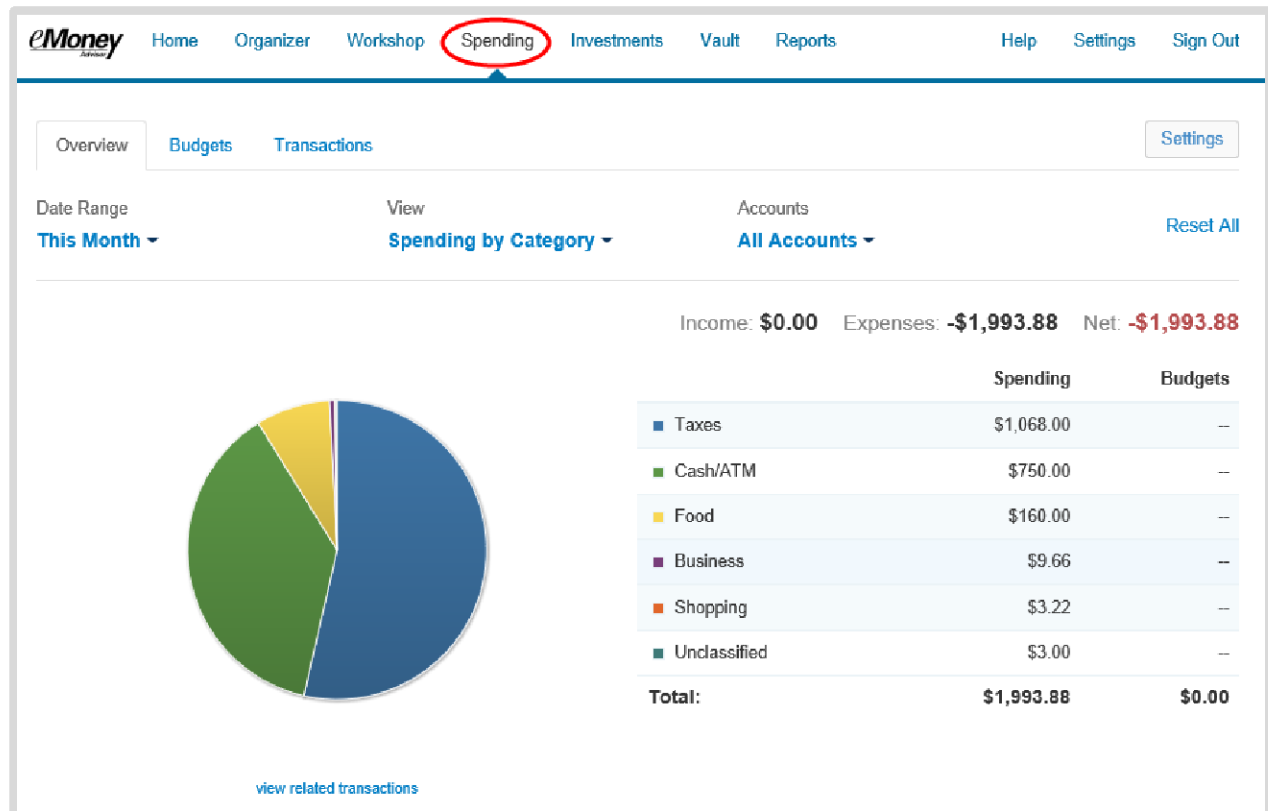
**Before you begin** make sure these Organizer sections are complete:

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

[Begin](#)

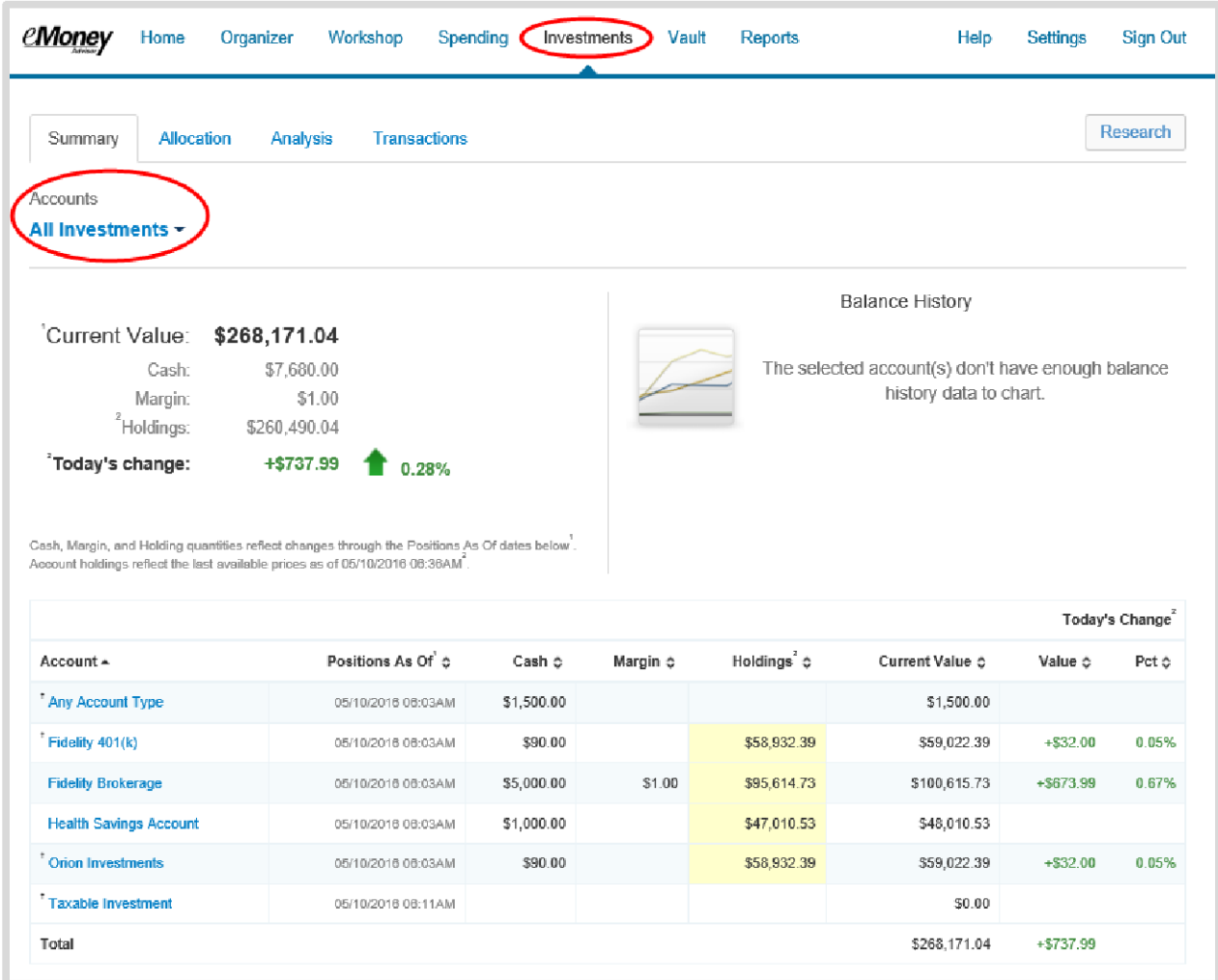
## Website Overview

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.



## Website Overview

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.



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

Summary Allocation Analysis Transactions Research

Accounts  
**All Investments** ▾

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

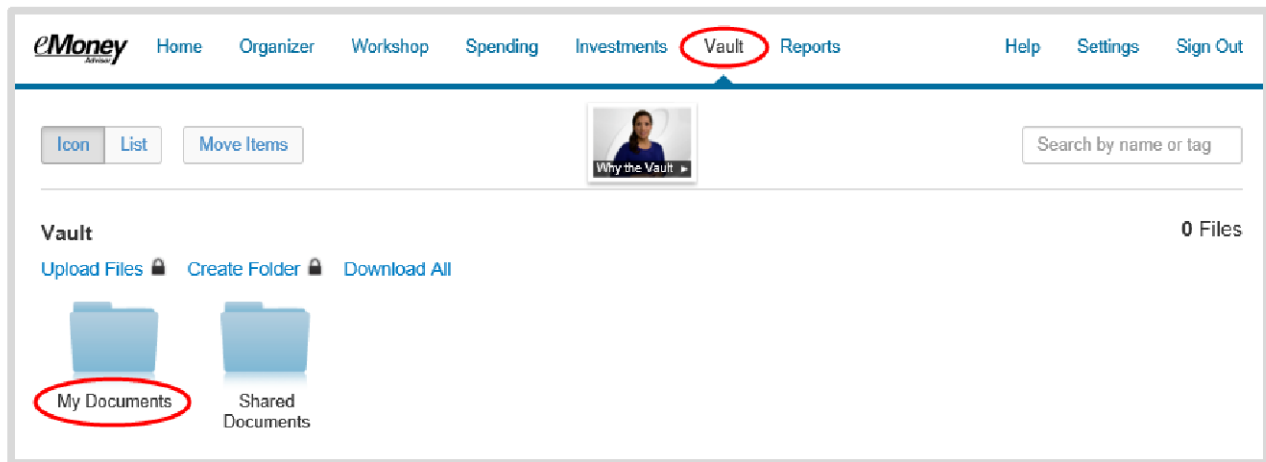
Balance History  
The selected account(s) don't have enough balance history data to chart.

Cash, Margin, and Holding quantities reflect changes through the Positions As Of dates below.<sup>1</sup>  
Account holdings reflect the last available prices as of 05/10/2018 08:36AM.<sup>2</sup>

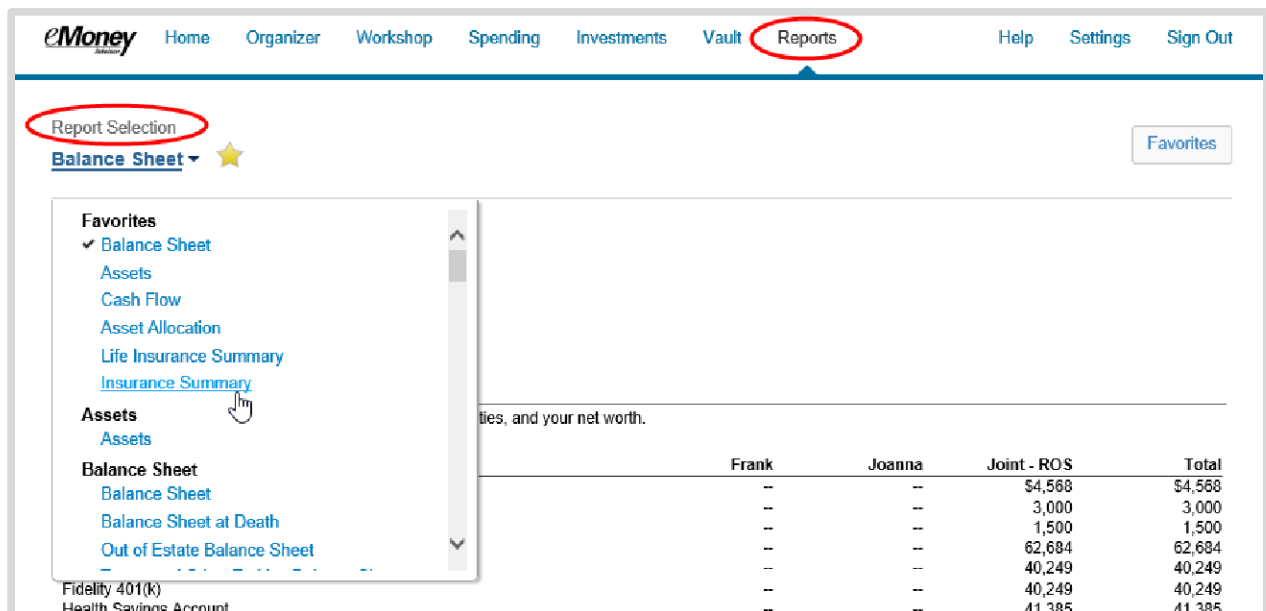
Account ▲	Positions As Of <sup>1</sup> ⚙	Cash ⚙	Margin ⚙	Holdings <sup>2</sup> ⚙	Current Value ⚙	Today's Change <sup>2</sup>	
						Value ⚙	Pct ⚙
<sup>†</sup> Any Account Type	05/10/2018 08:03AM	\$1,500.00			\$1,500.00		
<sup>†</sup> Fidelity 401(k)	05/10/2018 08:03AM	\$90.00		\$58,932.39	\$59,022.39	+\$32.00	0.05%
Fidelity Brokerage	05/10/2018 08:03AM	\$5,000.00	\$1.00	\$95,614.73	\$100,615.73	+\$673.99	0.67%
Health Savings Account	05/10/2018 08:03AM	\$1,000.00		\$47,010.53	\$48,010.53		
<sup>†</sup> Orion Investments	05/10/2018 08:03AM	\$90.00		\$58,932.39	\$59,022.39	+\$32.00	0.05%
<sup>†</sup> Taxable Investment	05/10/2018 08:11AM				\$0.00		
<b>Total</b>					\$268,171.04	+\$737.99	

## Website Overview

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.

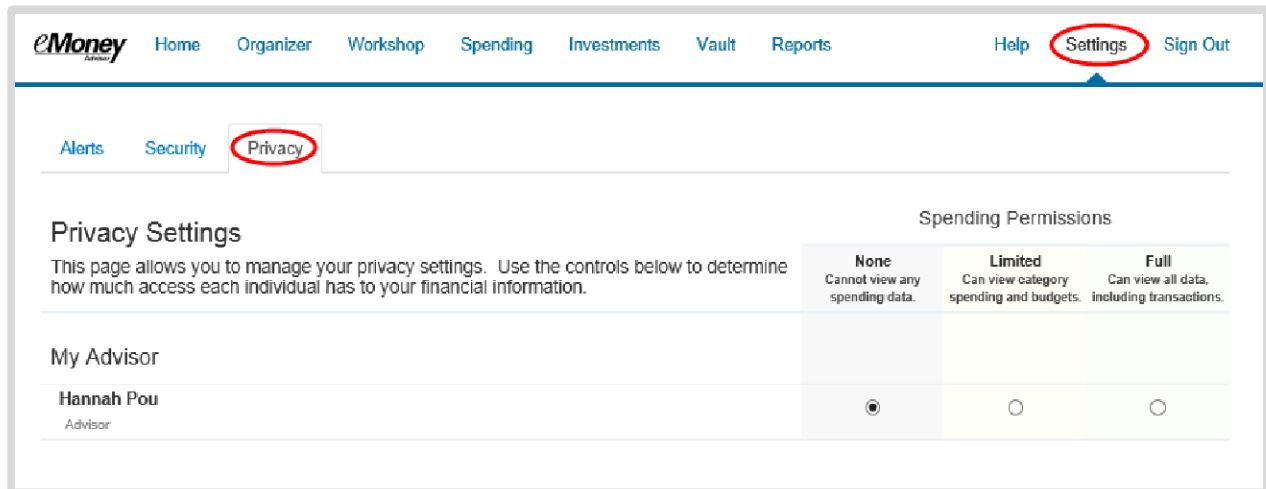


7. The **Reports** tab provides you with a series of reports about your financial situation.



## Website Overview

- 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.



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

Alerts | Security | **Privacy**

### Privacy Settings

This page allows you to manage your privacy settings. Use the controls below to determine how much access each individual has to your financial information.

#### My Advisor

	None Cannot view any spending data.	Limited Can view category spending and budgets.	Full Can view all data, including transactions.
<b>Hannah Pou</b> Advisor	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>