

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**.

The screenshot shows the emX financial website interface. At the top, the navigation bar includes 'Home', 'Organizer' (circled in red), 'Goals', 'Spending', 'Investments', 'Vault', 'Reports', and utility icons for a checkmark and a bell. On the right, there are links for 'Settings' and 'Sign Out'. Below the navigation, a welcome message reads 'Welcome, Frank and Joanna McMiller'. On the left, there is a list of account categories with their respective balances and a '+ Add Account' link. The main content area features three summary cards: 'Net Worth' at \$2,380,328, 'Investments' at \$1,019,838, and 'Goals' as of today. The 'Goals' section shows progress for 'Retirement 2019 - 2050' (27 of 32 years projected) and 'Education Expense 2017 - 2019' (\$0 of \$0 projected). At the bottom, there is a 'Spending' section with a 'View All' link.

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

2. Click **Accounts**.

The screenshot shows the 'Organizer' page in the emX financial website. The 'Organizer' menu item in the top navigation bar is circled in red. Below the navigation, there is a list of menu items: 'Accounts' (circled in red), 'Professional Contacts', 'Income, Expenses, and Savings', 'Future Expenses', and 'Financial Priorities'. The main content area features two profile cards for 'Frank Miller' (FM) and 'Joanna Miller' (JM). Each profile card has a circular avatar and a list of options: 'Add Phone', 'Add Email', and 'Add Employment'. The 'Add Employment' option includes a calendar icon and a date (6/1/1964 for Frank and 3/20/1965 for Joanna).

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

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.

Go back to Accounts

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

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

Go back to Accounts

Add Accounts

Enter your institution's name or website address

| 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

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.

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Add Accounts

8. 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](#)

9. 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

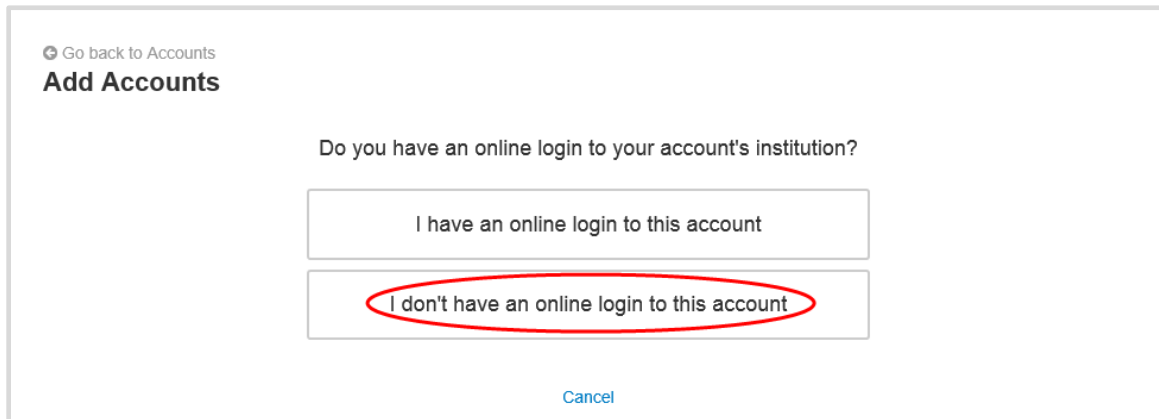
Add Accounts

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.

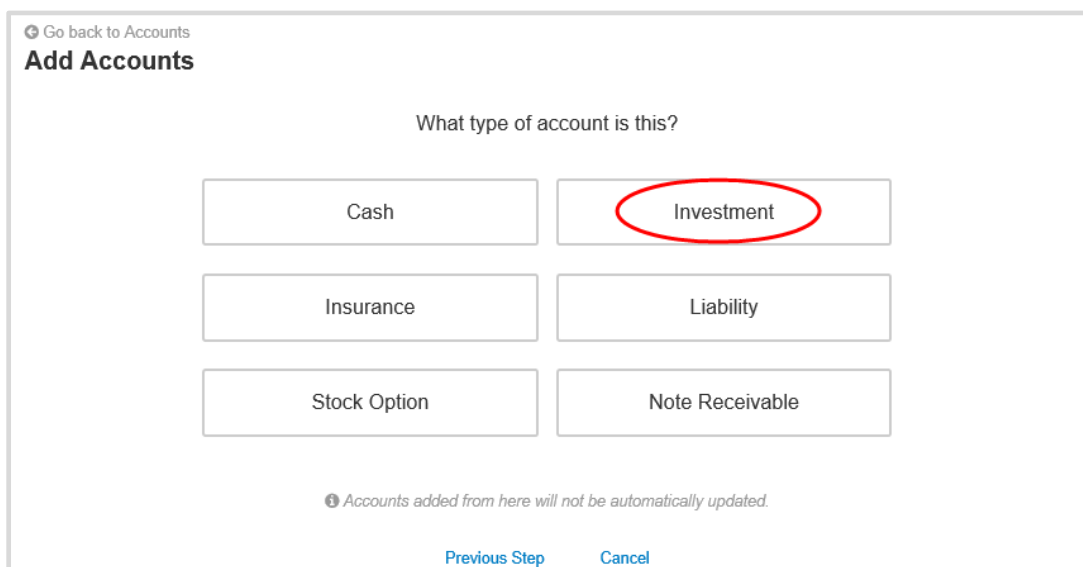
1. Click **Add** on the Accounts page.



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"/>