

# Organizer Overview

In this guide we will walk you through the features of your eMoney Client Site **Organizer**. Use the Organizer to group all your financial information in one place. Click the different sections to add and edit the related information. The information included here will be used to populate other areas of the application, including the Home page.

1. To access the organizer, click the **Organizer** tab from the features bar.

The screenshot shows the eMoney Organizer dashboard. At the top, the navigation bar includes 'emx', 'Home', 'Organizer' (highlighted with a red circle), 'Goals', 'Spending', 'Investments', 'Vault', 'Reports', 'Settings', and 'Sign Out'. Below the navigation bar, a welcome message reads 'Welcome, Frank and Joanna McMiller'. The dashboard is divided into several sections:

- Accounts:** A table listing various account types with their current balances and a '+ Add Account' button.
- Net Worth:** A blue box showing a net worth of \$1,873,612 as of today, with a change of \$0 this month.
- Investments:** A green box showing investments of \$702,120 as of today, with a change of -\$492 and -0.07% this month.
- Goals:** A section titled 'Goals as of today' with a 'View All' link. It features a 'Retirement' goal for the years 2032 - 2057, showing a progress bar and 'Projected Funding' of 2 of 26 years. Below this is a call to action: 'Open an investment account to fund your goal and increase your chances of success' with a button labeled 'Open a New Account'.

Accounts	+ Add Account
Cash	\$57,568
Credit Cards	-\$3,643
Investments	\$467,067
Life Insurance	\$14,500
Loans	-\$326,385
Property	\$425,000
Stock Options	\$1,239,505

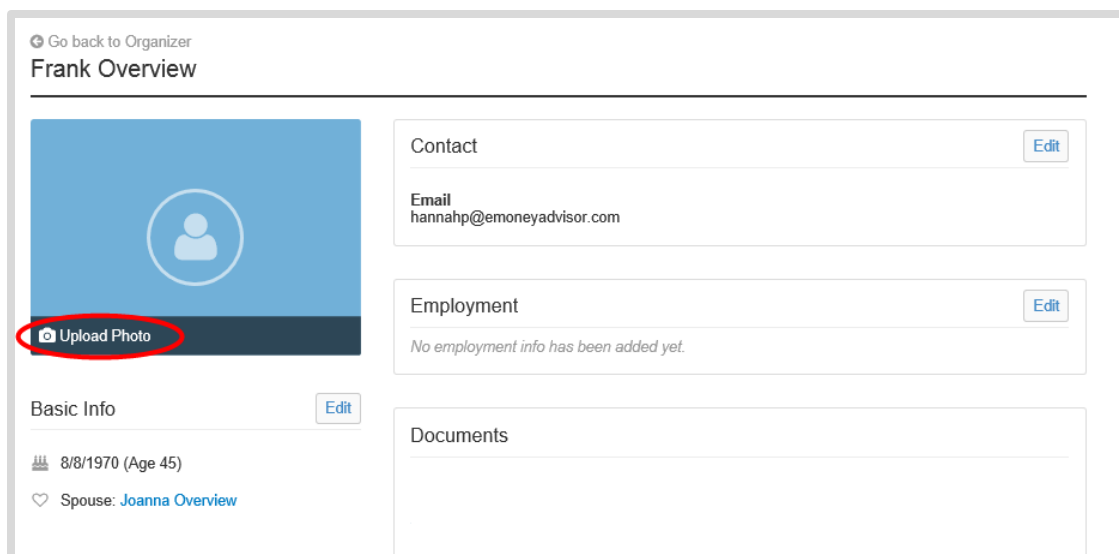
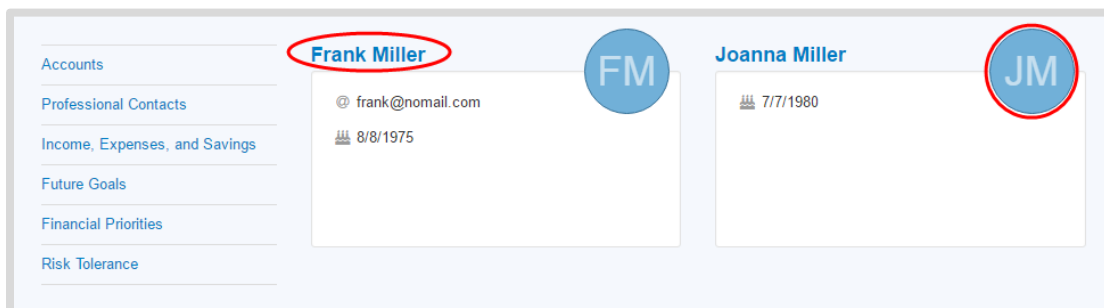
# Organizer Overview

2. The organizer allows you to group all of your financial information in one place as seen below.

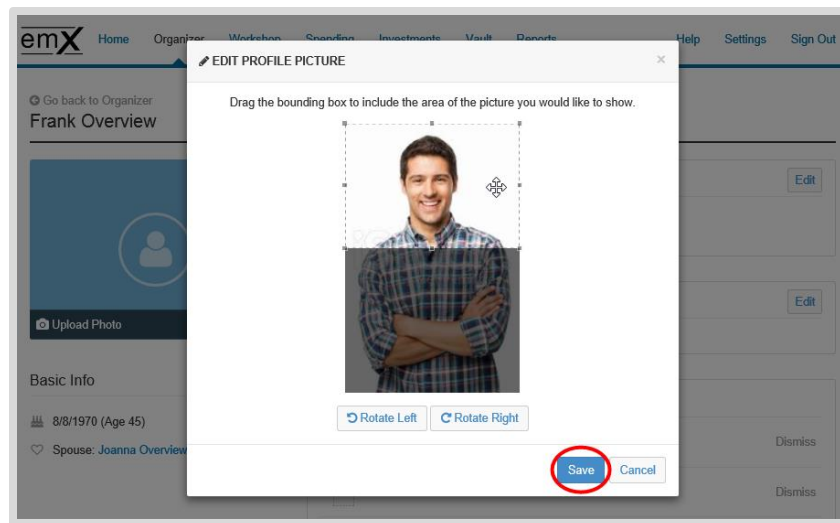
The screenshot displays the eMoney Organizer Overview interface. On the left is a navigation menu with categories: Accounts, Professional Contacts, Income, Expenses, and Savings, Future Goals, Financial Priorities, and Risk Tolerance. The main area features two profile cards for Frank Miller (FM) and Joanna Miller (JM). Frank Miller's profile includes 'Add Phone', email 'hannahp@emoneyadvisor.com', birthdate '6/1/1964', and 'Add Employment'. Joanna Miller's profile includes 'Add Phone', 'Add Email', birthdate '3/20/1965', and 'Add Employment'. Below the profiles are two sections: 'People' and 'Property'. The 'People' section shows five circular icons for Peter (PM), Mary Beth (MM), Lucas (LM), Elaine (EG), and Stephanie (SM), with an 'Add Person' button circled in red. The 'Property' section shows four asset cards: 'Cars' (diamond icon), 'Home' (house icon), 'Jewelry' (diamond icon), and 'Vacation Mountain Home' (house icon), with an 'Add Property' button circled in red.

# Organizer Overview

3. To modify any of your personal information or upload a profile picture to the site, click your name. To upload a picture, click **Upload a Photo** and search directly from the computer's desktop.



# Organizer Overview




# Organizer Overview

- 4. After clicking into your profile, you and your spouse can edit Basic Info, Contact and Employment Info and also upload relevant documents to your online vault.

[Go back to Organizer](#)

## Frank Overview

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**Contact** [Edit](#)


**Email**  
hannahp@emoneyadvisor.com

**Employment** [Edit](#)

*No employment info has been added yet.*

**Basic Info** [Edit](#)

 8/8/1970 (Age 45)

 Spouse: [Joanna Overview](#)

**Documents**

### Please Note:

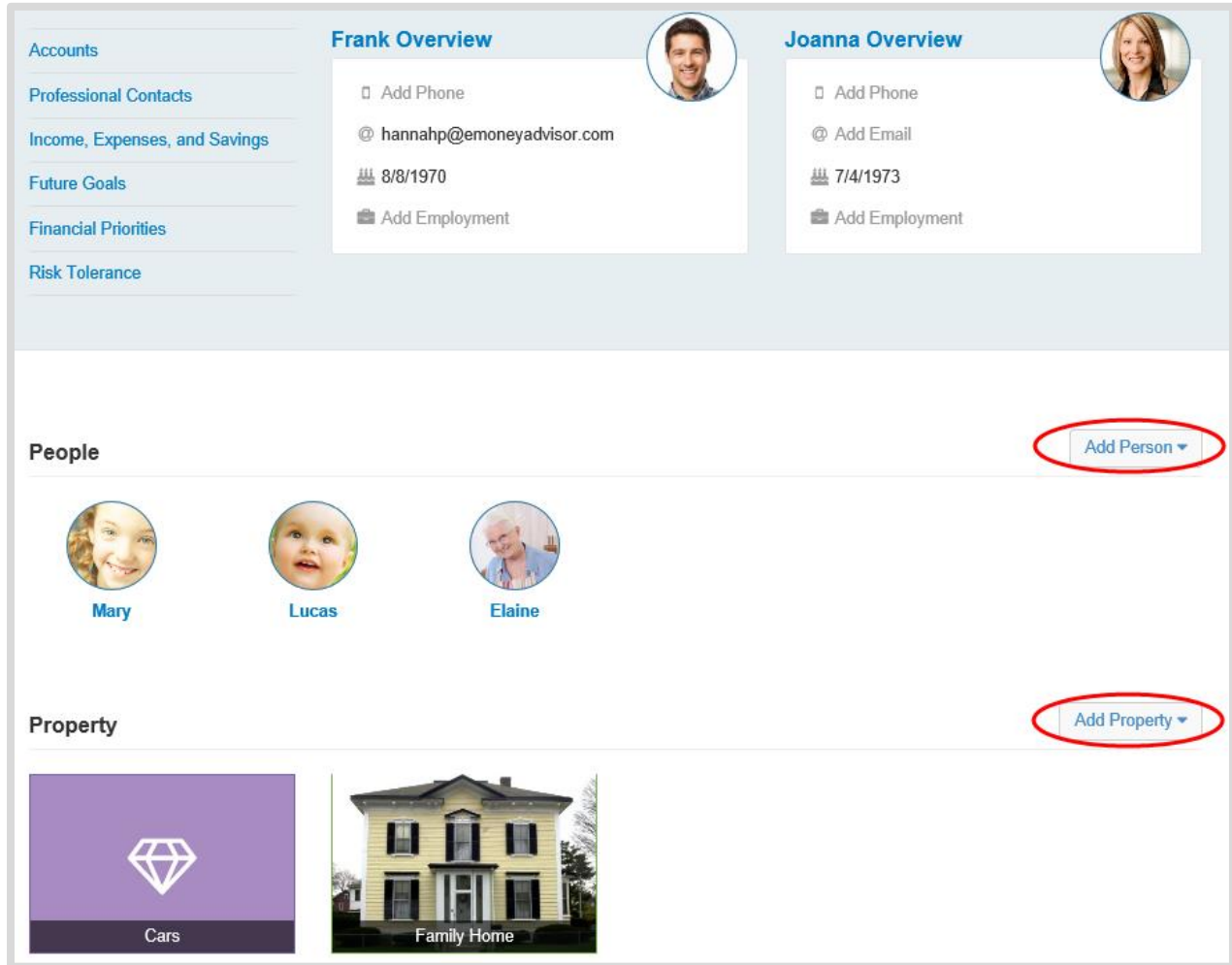
**Basic Info:** First & Last name, DOB, Gender, Special Needs, In Good Health, and Marital Status

**Contact Info:** Email, Phone, Mobile Phone, Fax, and Full Address. Note that only the Mobile Phone number is what will display on the organizer overview.

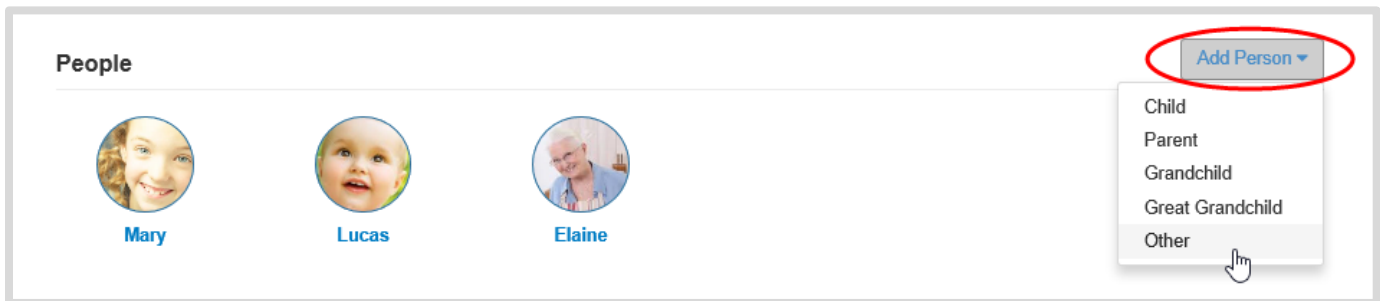
**Employment Info:** Employer Name, Job Title, Email

# Organizer Overview

5. On the organizer main tab, you will also be able to add relevant **People** and **Property**.

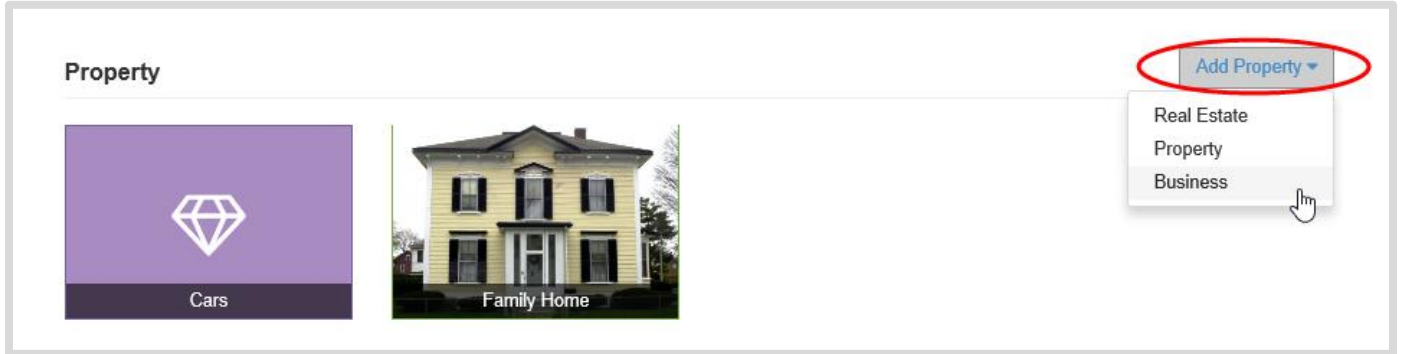


6. To add a person, click **Add Person** and choose what to add & enter details. You can upload a picture of each person on their individual page.

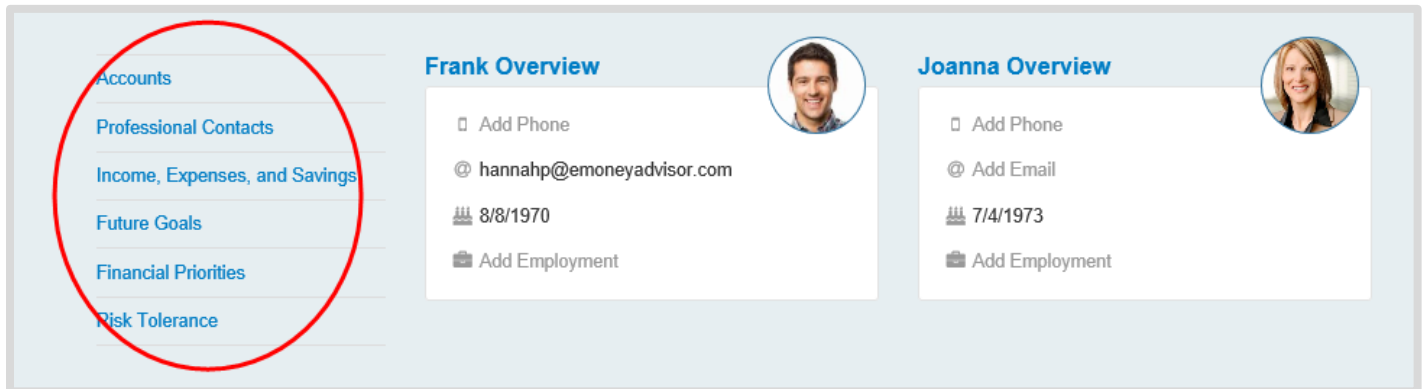


# Organizer Overview

7. To add property, click **Add Property** and select Real Estate, Property, or Business.



8. The menu options on the upper left side of the organizer tab lists out the available sections the client can view and/or modify. Click an item to view its details. Click **Add** to add information within a section, and click **Save** to save the changes.



# Organizer Overview

**Please Note:**

**Accounts:** allows you to add your online accounts directly from an institution or to add them manually. Click the Add button at the top of the page to enter your institution's name or to select the icons to add insurance policies and other accounts that are not connected to your institutions.

**Professional Contacts:** allows you to add information about any relevant contacts. Your Advisor will always be listed first in this section. Click Add, and then add contact information.

**Income, Expenses, and Savings:** contains your annual income, living expenses, and savings and contributions.

**Future Goals:** allows you to enter in an assumed age of retirement, view existing or add education goals, and any existing or new major expenses.

**Financial Priorities:** used to assign an order to your financial goals. Client and Spouse can prioritize their goals.

**Risk Tolerance:** used to define how much risk you are willing to accept. You can make changes to their answers at any time.



# Organizer Overview

- The organizer allows you to add any relevant documents to an entry by utilizing the **Documents** feature within certain organizer entries. You can either upload a document from your desktop, or tie an existing vault document to the entry. Anything uploaded through documents will automatically be added to your Shared Documents folder in the vault. Below screen shot is an example of the Documents section of a Taxable Investment.

The screenshot displays a web form for a 'Taxable Investment'. At the top left, there is a link 'Go back to Accounts'. The main title is 'Taxable Investment'. Below this, there is a form with several fields: 'Asset Name' (filled with 'Taxable Investment'), 'Institution Name' (empty), 'Owner' (filled with 'Frank and Joanna (Joint/ROS)' and an '+ Add' button), 'Total Value' (filled with '\$85,000'), 'Holdings Value' (empty), 'Cash Balance' (empty), 'Margin Balance' (empty), and 'Tax Basis' (empty). To the right of the form, there is a 'View Holdings' button and a 'View' section with links for 'Investment Summary', 'Asset Allocation', and 'Investment Transactions', along with a 'Delete this Account' button. At the bottom of the form, there are 'Save' and 'Cancel' buttons. Below the form, there is a 'Documents' section with a red circle around the '+ Add Other -' button. At the bottom of the 'Documents' section, there is a link 'View dismissed suggestions'.


# Organizer Overview

10. Professional Contacts allows you to add information on key contacts. Your advisor will always be listed first in this section.

[Go back to Organizer](#)





## Professional Contacts

[Add](#)



eMoneyAdvisor, LLC  
1001 E. Hector Street, Suite 401  
Conshohocken, PA 19428

**Hannah Pou**  
hannahp@emoneyadvisor.com  
Office: (888) 362-8482  
[Contact Me](#)

Contact Name	Role	Email	Phone
 <a href="#">Ben Alliance</a>	Alliance Partner	<a href="mailto:hannahp@emoneyadvisor.com">hannahp@emoneyadvisor.com</a>	(888) 362-8482 
 <a href="#">Joe Murphy</a>	CPA	<a href="mailto:joemurphy@nomail.com">joemurphy@nomail.com</a>	(888) 362-8482 

# Organizer Overview

11. Income, Expenses, and Savings will contain your annual income, living expenses, and savings & contributions.

**Income, Expenses, and Savings**

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Annual Income [Add](#)

Income	Value
Frank's Salary	\$90,000 <span style="color: red;">✕</span>
Joanna's Salary	\$65,000 <span style="color: red;">✕</span>

Annual Living Expenses [Add Itemized](#)

Annual Living Expenses	\$65,000
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12. Future Goals allows you to add retirement goals, education goals, and any major expense goals. Click Add to create a new goal.

**Future Goals**

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**Retirement**

Frank's retirement age	62
Joanna's retirement age	65

**Education Expenses** [Add](#)

Lucas College	\$37,318 <span style="color: red;">✕</span>
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**Major Expenses** [Add](#)

Addition to House	\$80,000 <span style="color: red;">✕</span>
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# Organizer Overview

13. Financial Priorities are used to help create an accurate view of your plans regarding your finances. Here you can assign an order to their financial goals.

The screenshot shows the 'Financial Priorities' section of the eMoney website. It features two columns for different users: Frank and Joanna. Each column has a 'Change' button. Frank's priorities are: 1. Saving for College, 2. Planning for Retirement, 3. Managing a Budget, 4. Providing a Legacy, 5. (empty), 6. (empty). Joanna's priorities are: 1. Insuring Your Life, 2. Creating Retirement Income, 3. Saving for College, 4. Contributing to Charity, 5. Providing a Legacy, 6. Saving for Major Purchases. The 'Change' button for Joanna is circled in red.

14. Risk Tolerance provides a 12 question questionnaire. You will need to answer all 12 questions in full to see your risk score.

