

In this user guide we will demonstrate how to set up your Client Connections.

1. Click on **Add** in the Accounts section under the Home page.

**Jim and Jane Sample** | Education Center | Help | Join Screen Sharing Session | Settings | Log out

Home | Organizer | Workshop | Spending | Investments | Vault | Reports

**FINANCIAL ALERTS** | MANAGE ALERTS

**1080 Financial Group**  
 Trusted Advisor  
 TrustedAdvisor@nomail.com  
 Office: (888) 888-8888 | All Contacts

**NET WORTH** TODAY  
**\$2,731,089**  
 THIS MONTH: +\$1,387,861 (+103.32%)  
 YEAR TO DATE: +\$2,995,867 (+1,131.46%)

**INVESTMENTS** TODAY  
**\$1,328,373<sup>1</sup>**  
 CHANGE<sup>2</sup>: +\$612.88 (+0.05%)

**ACCOUNTS\*** | **+ Add**

Cash	\$22,704	>
Credit Cards	-\$10,929	>
Investments	\$1,330,401	>
Life Insurance	\$43,500	>
Loans	-\$1,279,155	>
Property	\$0	>
Stock Options	\$2,624,568	>

**SPENDING**  
 Add bank accounts and credit cards to monitor transactions and analyze spending.  
 + Add Accounts

**BUDGETS**  
 Add bank accounts and credit cards to monitor transactions and analyze spending.  
 + Add Accounts

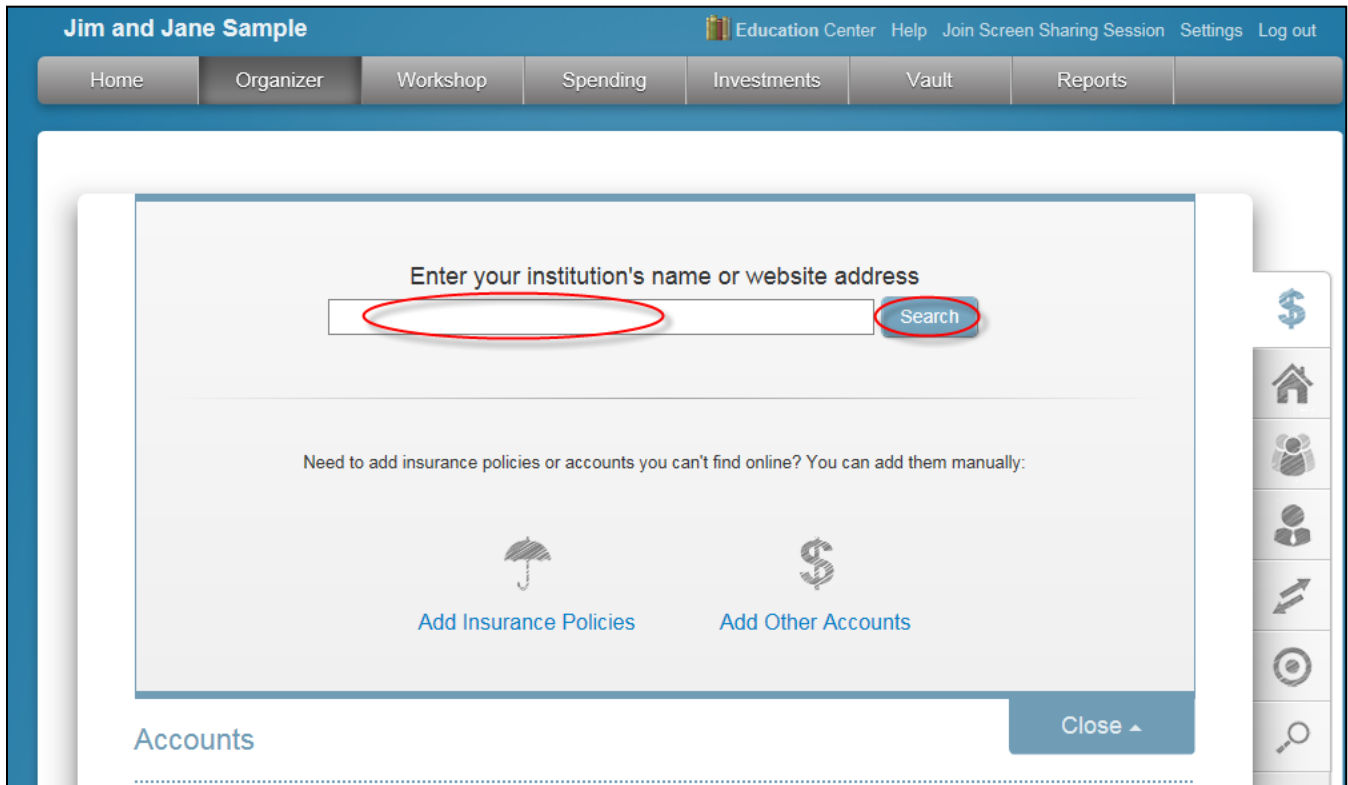
**PROTECTION**

Variable Universal Life	\$1,000,000
eMoney Advisor Source (E...)	
Variable Universal Life	\$1,000,000
eMoney Advisor Source (E...)	
Auto	
eMoney Advisor Source (E...)	

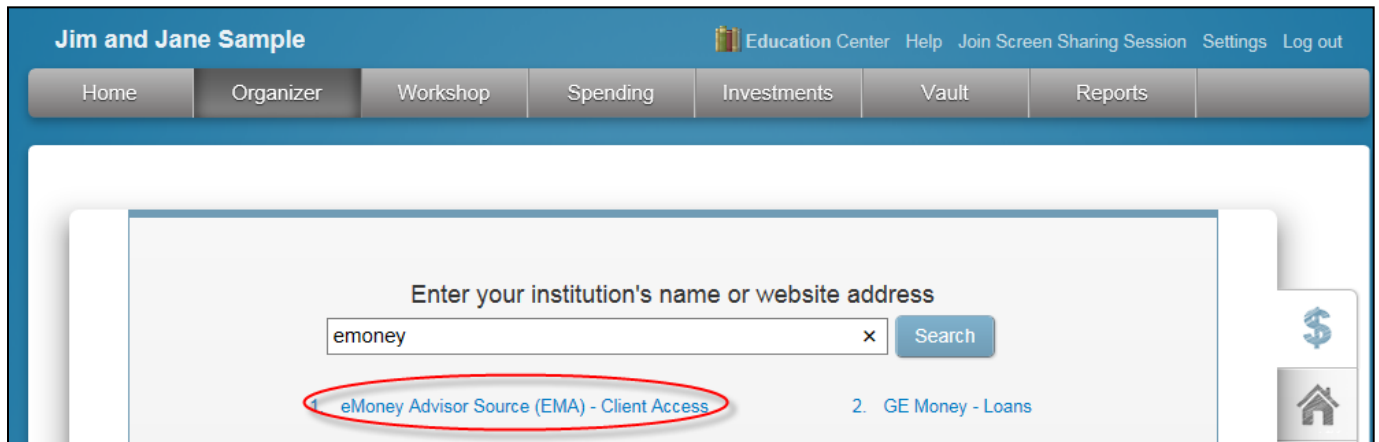
More

**TOUR GUIDE**  
 Get an overview of how to get started with your personal financial website.  
 GET STARTED ▶

2. Enter the institution name or website address in the search bar and click **Search**.



3. From the list of results, select the correct institution.



4. Enter your credentials and click **Connect**.

**Connect to Institution** [X]

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wealth.emaplan.com

**View an important message about this institution.**

To connect to your accounts, enter your credentials below.

**User Name**

**Password**

**Connect**

Please note:

The system will take a moment to verify and retrieve your information.

**Accounts** [ + Add ]

6 Cash   6 Credit Cards   12 Investments   13 Insurance   3 Loans   3 Others

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Verifying your credentials... [loading spinner]

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5. The account values are pulled through onto the accounts page.

† Orion Investments	Taxable Investment	02/05/2015 10:44AM	\$40,249
† Permanent Life Insurance	Life Insurance - Variable Univers...	02/05/2015 10:44AM	\$14,500
Blue Credit Card	Loan - Credit Card	02/05/2015 10:44AM	-\$2,368
† Fidelity 401(k)	Qualified Retirement - Traditional...	02/05/2015 10:44AM	\$40,249
Stock Options	Stock Option	02/05/2015 10:44AM	\$1,239,505

6. To maintain the connection, see options in the upper right corner.

Accounts + Add

8 Cash 8 Credit Cards 15 Investments 19 Insurance 4 Loans 4 Others

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delete settings find new refresh