



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

**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<sup>1</sup>** + 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 >

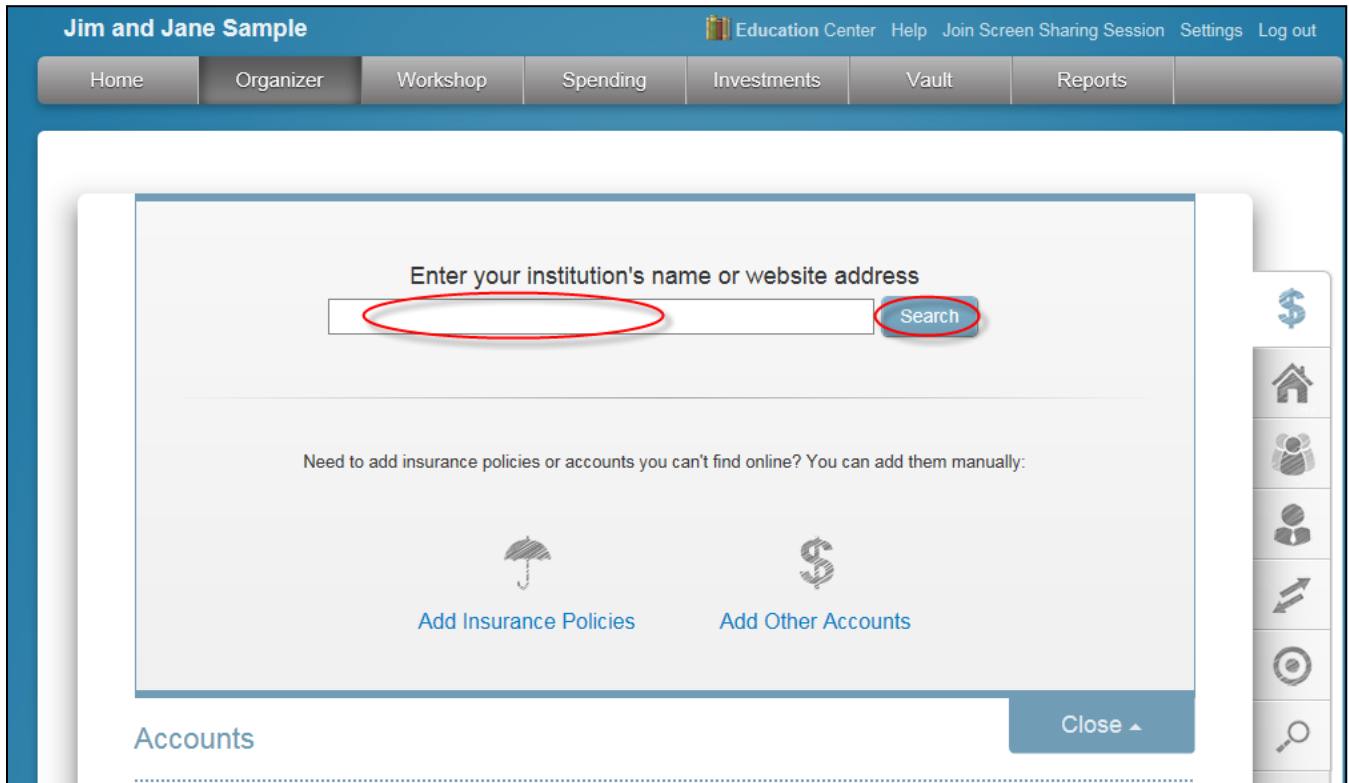
**SPENDING**  
Add bank accounts and credit cards to monitor transactions and analyze spending.  
+ Add Accounts

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

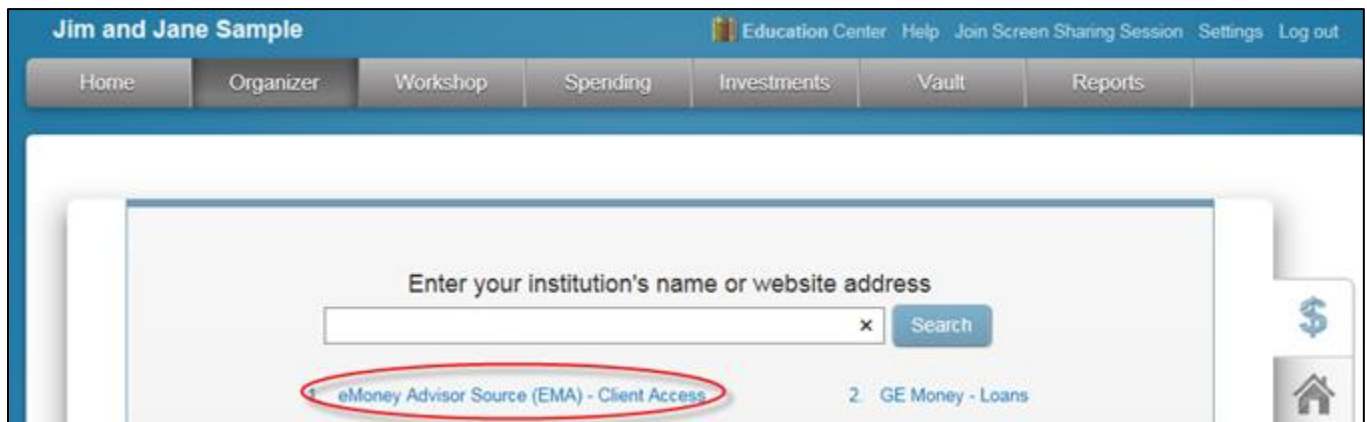
**PROTECTION**  
Variable Universal Life \$1,000,000  
eMoney Advisor Source (E...  
Variable Universal Life \$1,000,000  
eMoney Advisor Source (E...  
Auto  
eMoney Advisor Source (E...  
More

**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 ×

**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

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

Verifying your credentials... ↻

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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

delete   settings   find new   refresh