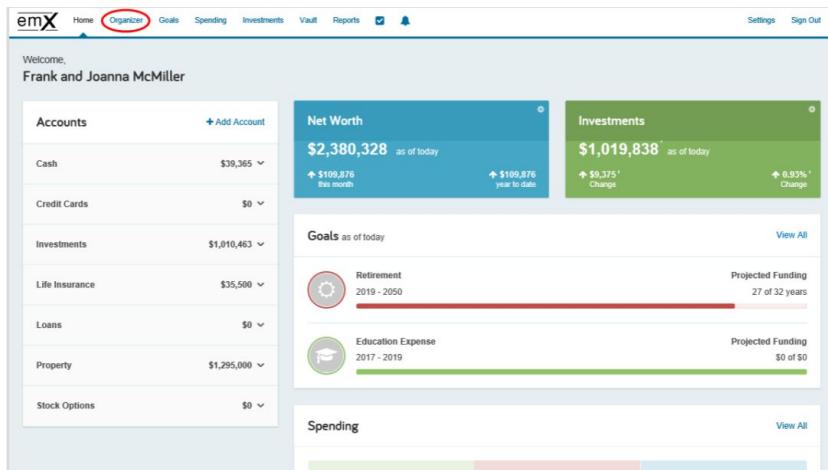


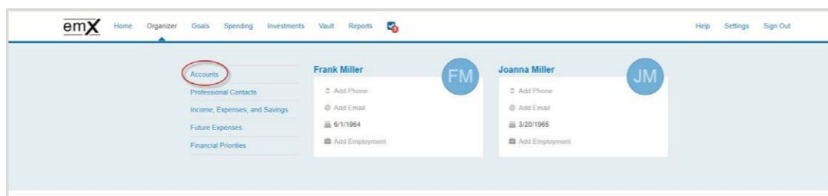
## How to link your accounts:

1. [Click here to log into your account.](#)
2. From the home page click “Organizer”

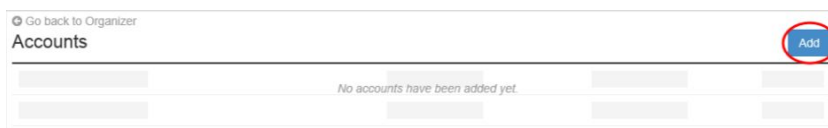


You can also click the +Add Account link from the home page!

3. Click “Accounts”



4. Click “Add”



5. 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

6. 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

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](#)

7. 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)

1. [eMoney Advisor Source \(EMA\) - Client Access](#)

8. 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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[Continue](#)

9. 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

**eMoney**  
wealth.emaplan.com

To connect to your accounts, enter your credentials below.

**User Name**

**Password**

[Connect](#)

10. 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

**eMoney**

✔ 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**

11. 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

**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](http://wealth.emaplan.com)

12. 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.

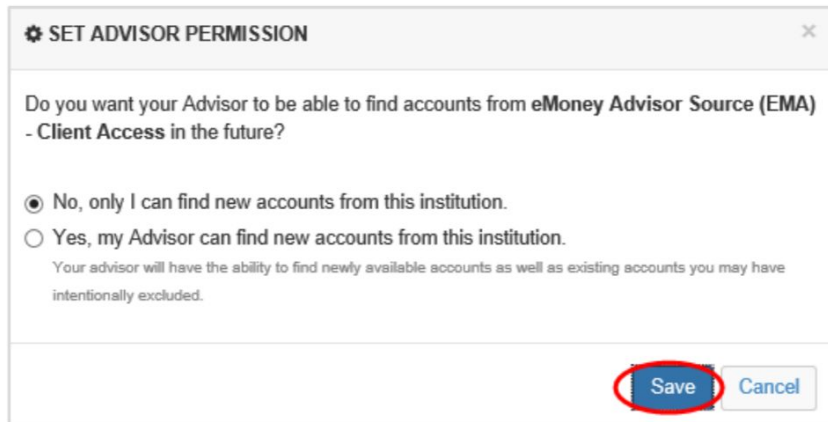
Go back to Organizer

## Accounts

**eMoney**

delete settings find new refresh

13. 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** **Cancel**

All your data is protected by the highest security measures. [Click here to see the technical specifications.](#)