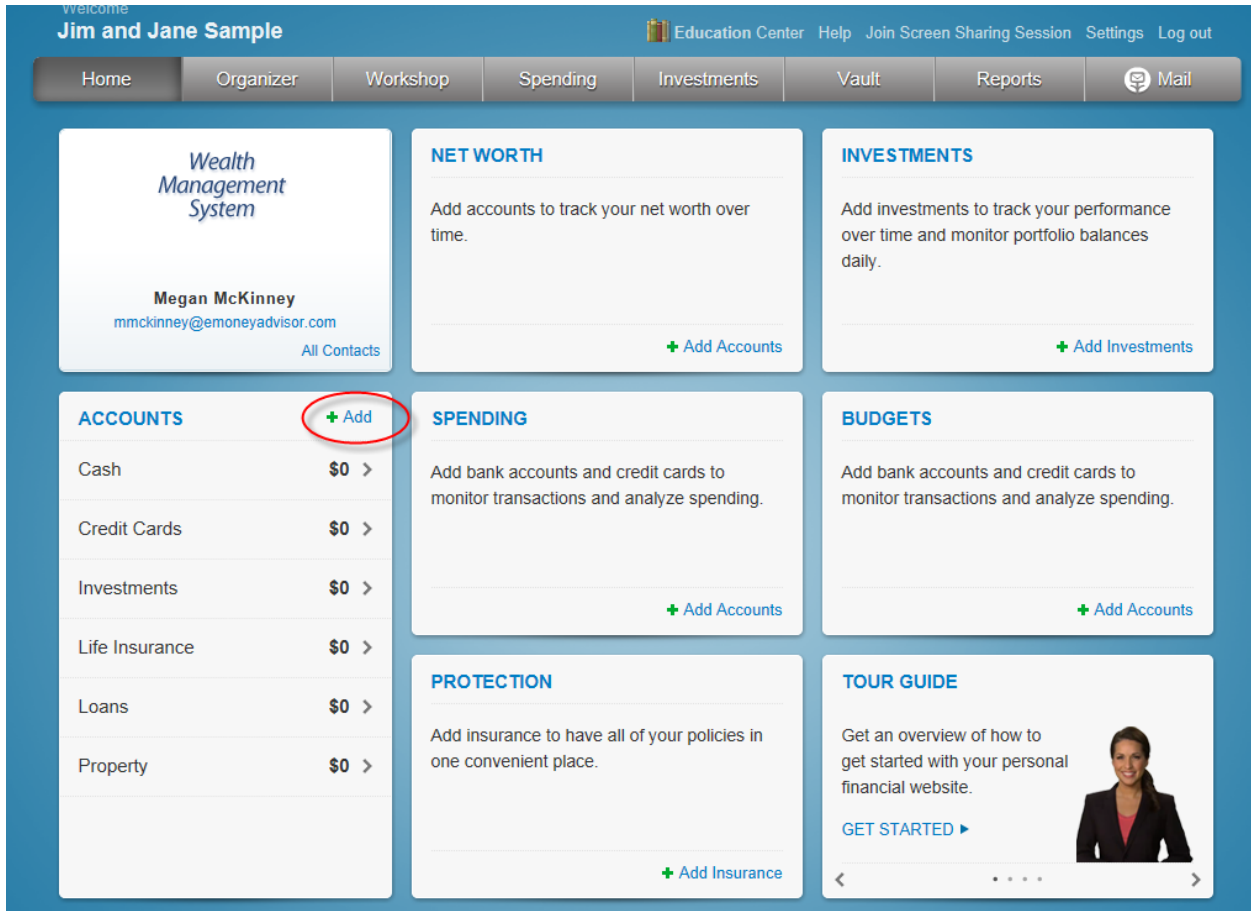
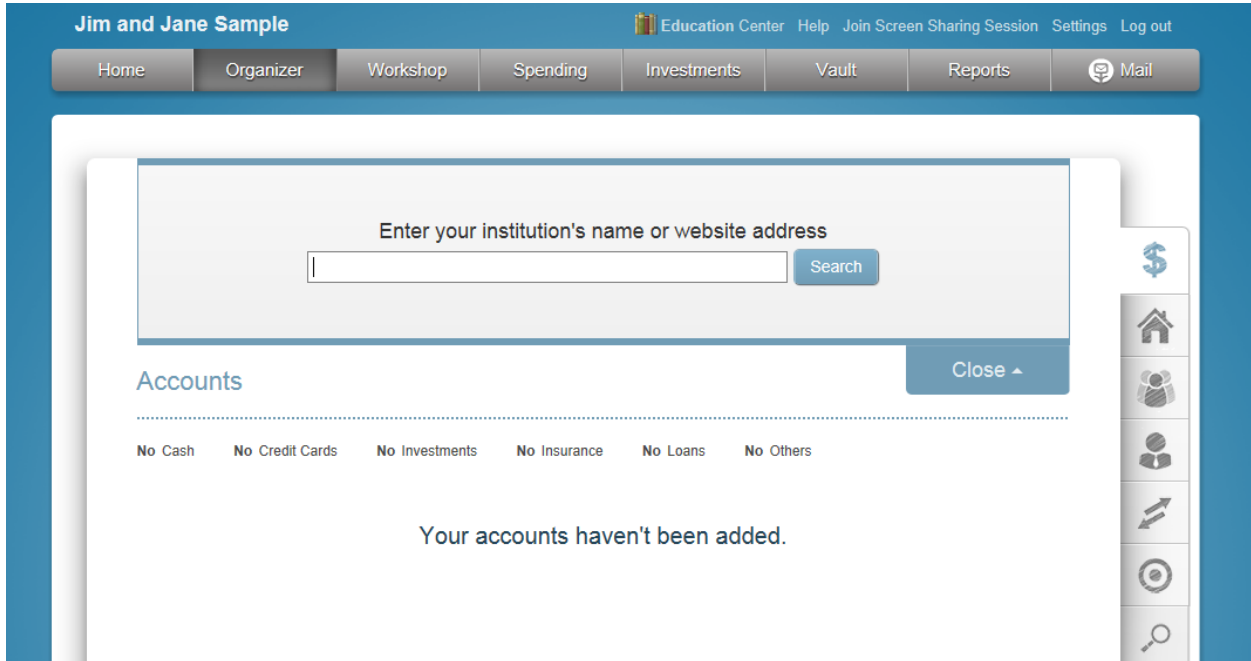


This booklet is designed to assist with setting up connections in **your Wealth Management System**.


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



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.

**Jim and Jane Sample**  Education Center [Help](#) [Join Screen Sharing Session](#) [Settings](#) [Log out](#)

Home Organizer Workshop Spending Investments Vault Reports Mail

Enter your institution's name or website address

 [Search](#)

- 1. eMoney - alpha/ema - Client Access
- 2. eMoney - localhost
- 3. Budget Bank
- 4. Mikee Pet O' Cold
- 5. eMoney Advisor Platform
- 6. eMoney Financial
- 7. GE Money - Loans
- 8. Life Insurance - Cash Test
- 9. Reliance Money

Close ▲

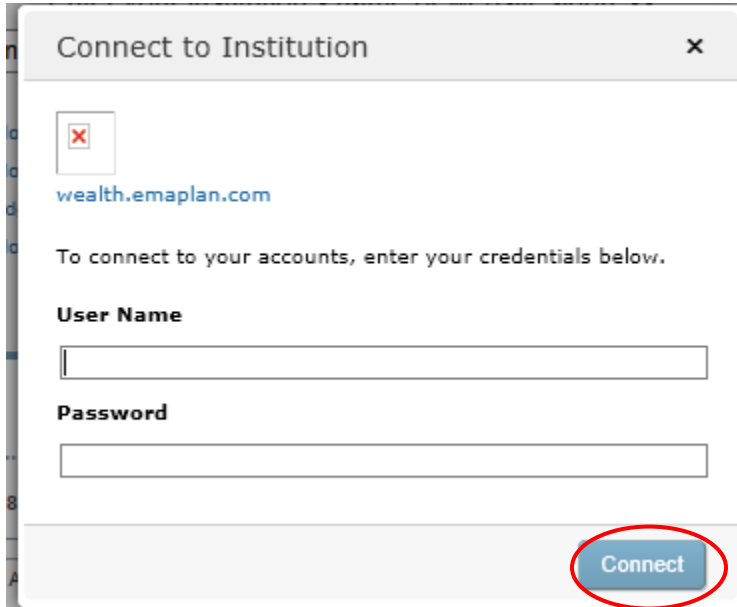
**Accounts**

No Cash No Credit Cards No Investments No Insurance No Loans No Others


Your accounts haven't been added.



Enter the credentials and click **Connect**.



Connect to Institution ×

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

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

No Cash   No Credit Cards   No Investments   No Insurance   No Loans   No Others





eMoney - alpha/ema - Client Access

Verifying your credentials... ↻

[View an important message about this institution.](#)

[beta.emadev.com](http://beta.emadev.com)

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

 <a href="#">Blue Credit Card</a>	Loan - Credit Card	01/31/2013 10:27AM	<b>-\$2,368</b>
 <a href="#">Disability Policy</a>	Disability Policy - Group Short Term	01/31/2013 10:27AM	<b>\$0</b>
 <a href="#">† Easy 123 Checking</a>	Cash Equivalent - Checking	01/31/2013 10:27AM	<b>\$4,568</b>
 <a href="#">† Electric Orange</a>	Cash Equivalent - Checking	01/31/2013 10:27AM	<b>\$3,000</b>
 <a href="#">† Fidelity 401(k)</a>	Qualified Retirement - Traditional...	01/31/2013 10:27AM	<b>\$40,249</b>
 <a href="#">† Fidelity Brokerage</a>	Taxable Investment	01/31/2013 10:27AM	<b>\$62,684</b>





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

**Accounts** + Add

---

2 Cash   2 Credit Cards   8 Investments   6 Insurance   1 Loan   1 Other

✖ eMoney Advisor Platform

 [delete](#)
 [settings](#)
 [find new](#)
 [refresh](#)