

CLIENT ACCESS> eMoney

eMoney is a financial planning website that allows you to view all of your accounts in one user-friendly location. Not only can you view all of your accounts held with Archstone Financial, but you can also link outside bank accounts, credit cards, brokerage accounts, or life insurance policies. eMoney also gives you the capability to track your spending, create budgets, and upload important documents into the eMoney Vault. Please remember that eMoney is a non-transactional website.

Click [here](#) to be directed to the webpage. Or put <https://wealth.emaplan.com/voyabd/Default.aspx?voyabd/northeast/> in your browser.



The image shows a login form for Archstone Financial's eMoney system. At the top center is the Archstone Financial logo. Below the logo are two input fields: 'Username' and 'Password'. Under the 'Password' field is a checkbox labeled 'Remember Me'. A blue button labeled 'Sign In' is positioned below the 'Remember Me' checkbox. At the bottom of the form area, there is a link that says 'Forgot your password?'.

Steps for setting up eMoney:

1. Once your personal eMoney website page is set up, you will receive an email from us containing your username and password.
2. Go to the eMoney webpage and enter your username and password. Press "Sign in".
3. You will then be prompted to change your temporary password. a. The new password must be at least 8 characters; must contain a mix of uppercase letters, lowercase letters and at least one numerical character.
4. You will then be prompted to set up 5 security questions. Please select a question from the list of questions, answer the question in the box below, and verify the answer.
5. You will then be directed to your personal eMoney webpage!

**Common Issues with eMoney:
I forgot my username.**

We send each client an email including both their username and temporary password. Please refer to this email. If you cannot locate this email, please call our office.

I forgot my password.

To reset your password please choose “Forgot your password?” You will then be prompted to enter your username and email address you would like the temporary password sent to. Press continue and you will then be prompted to answer a security question. You set the security question up during your initial login to eMoney.

I cannot remember the answers to my security questions.

Please call our office to have your security questions reset. Upon re-entry to eMoney, you will be prompted to set up your security questions again. Please write the answers to these questions down and store in a safe place for future access.

How can I link outside accounts?

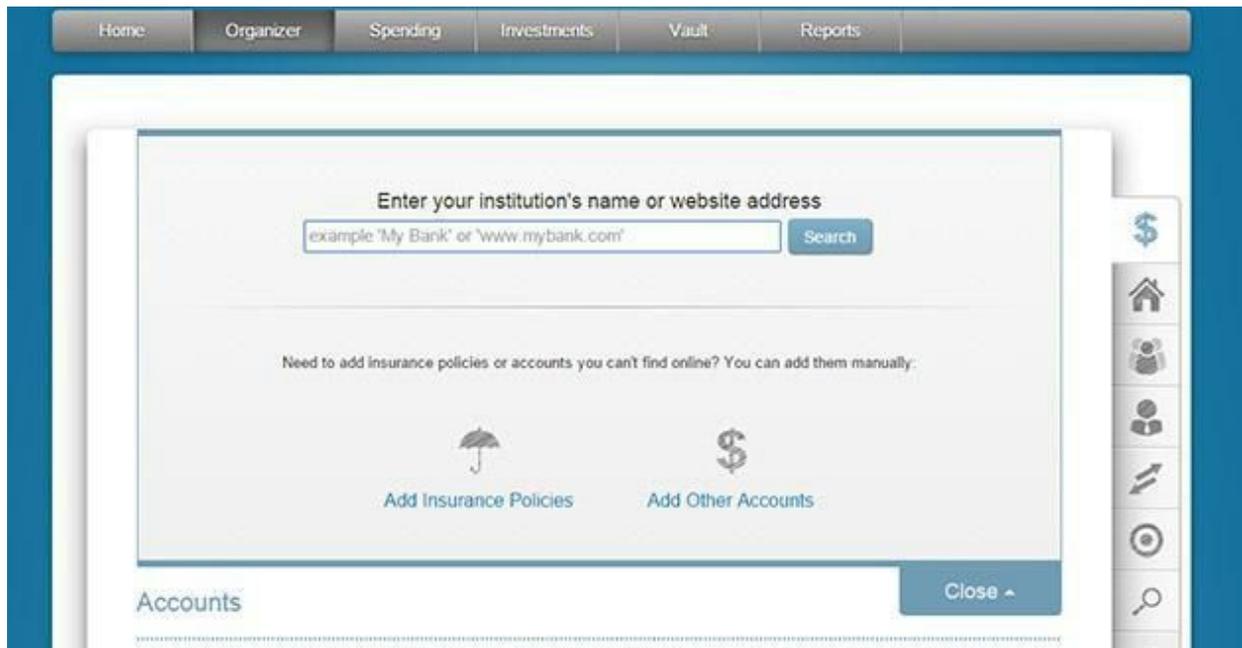
Once you login to eMoney and are on the homepage of the webpage, please choose the Organizer tab on the grey bar located at the top of your screen. Then choose Accounts. This will bring you to a list of your accounts.



Choose the blue “+Add” button at the top right-hand corner of the screen.



This will bring up a box to type in the name of the financial institution in which you are linking. Press the search key and choose the name of the financial institution in which you are linking from the given list. Please input your login credentials for that particular website and choose “Connect”. This will connect all of your accounts from the desired institution.

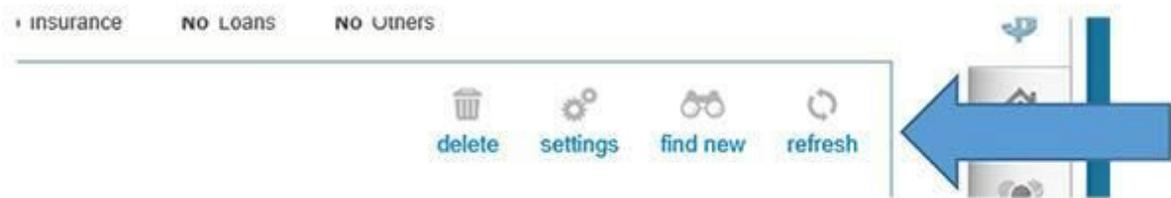


How do I link outside accounts if I do not have online access?

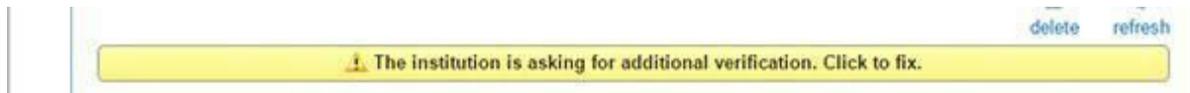
You will first need to obtain online access through the financial institution you are attempting to link. Online access is necessary to link outside accounts.

I do not see all of my accounts that I linked over from another financial institution.

If all of your accounts have not linked over, please click the binoculars above “find new”. This should bring over any missing accounts. If the issue persists, please call our office.



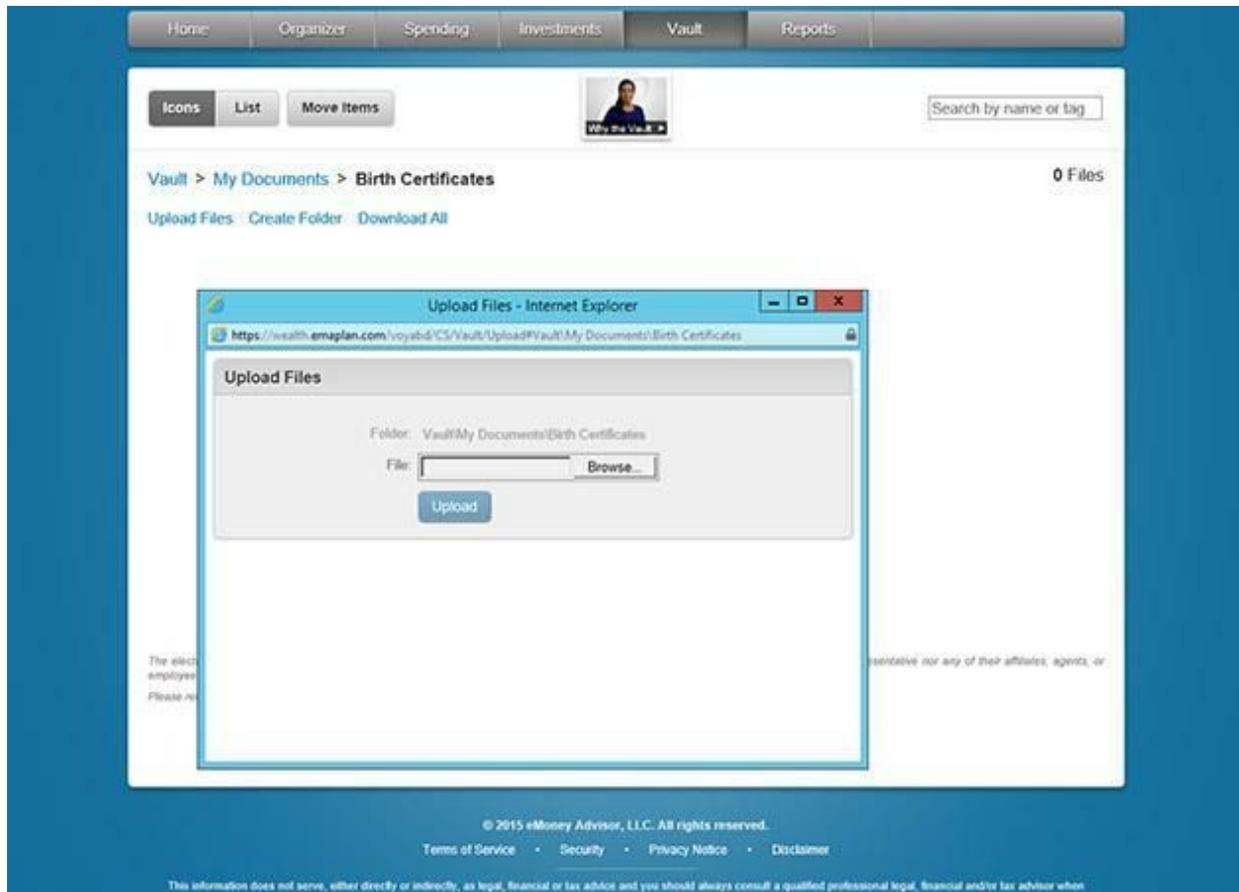
There is a yellow bar underneath my accounts. What does this mean?



eMoney is a third-party website. When you change your password at the financial website, you must also manually input this new password on the eMoney website. Please click the yellow bar and it will bring up another screen to input your personal information. After correctly inputting your credentials, press connect and eMoney will connect your accounts.

How can I upload documents to the Vault?

To upload documents to the vault, simply select Vault on the grey bar at the top of your screen. You may then choose “My Documents” or “Shared Documents”. My documents are personal and cannot be seen by your financial advisor, while shared documents allow your financial advisor to have access. Once chosen, you will be prompted to further choose another folder to upload your document based on the type of document you are uploading. Once in the desired folder, choose “Upload files at the top of your screen”. Then select “Browse” and select the document you would like to upload to your vault. Select “Upload” and your document will now be located in your vault for future access.



Further Questions?

Please call our office and any of our service associates will be happy to assist you!