

This booklet is designed to assist with setting up connections in your **PASSport** website.

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

The screenshot displays the PASSport website interface for John and Sue Smith. The top navigation bar includes 'Home', 'Organizer', 'Workshop', 'Spending', 'Investments', 'Vault', and 'Reports'. The main content area is divided into several sections:

- NET WORTH**: TODAY, \$489,882. THIS MONTH: -- --
- INVESTMENTS**: TODAY, \$482,842. CHANGE: -- --
- ACCOUNTS**: A list of accounts with a red circle around the '+ Add' button. The list includes:
  - Cash: \$7,568
  - Credit Cards: -\$3,643
  - Investments: \$482,842
  - Life Insurance: \$14,500
  - Loans: -\$426,385
  - Property: \$500,000
  - Option Plans: \$0
- SPENDING**: NET -\$3,349. You've spent \$3,399 this month. A pie chart shows categories: Auto & Transport, Fees & Charges, and Cash/ATM.
- BUDGETS**: Automatically create a budget based on your recent spending averages. Includes a 'Create a Budget' button.
- PROTECTION**: Lists insurance policies like Auto, Group Short Term, and Homeowner's.
- TOUR GUIDE**: Get an overview of how to get started with your personal financial website. Includes a 'GET STARTED' button and a photo of a woman.

2. Enter in your institution and click **Search**.

The screenshot shows the top navigation bar with the user name "John and Sue Smith" and links for "Education Center", "Help", "Settings", and "Log out". Below this is a menu with "Home", "Organizer", "Workshop", "Spending", "Investments", "Vault", "Reports", and "Accounts". The "Accounts" section is active, displaying a search box with the placeholder text "Enter your institution's name or website address" and an example "example: 'My Bank' or 'www.mybank.com'". A "Search" button is to the right of the input field. Below the search box is a "Close" button with a dropdown arrow. On the right side of the search box, there are three icons: a dollar sign, a house, and a person.

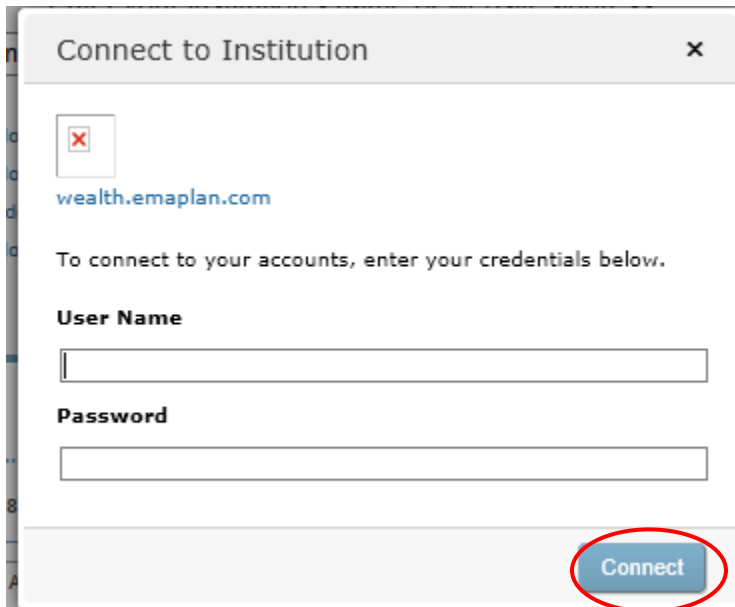
3. From the list, select your institution.

The screenshot shows the same interface as the previous one, but with the search results displayed. The search box contains the text "emoney" and the "Search" button is highlighted. Below the search box, there is a list of seven results:

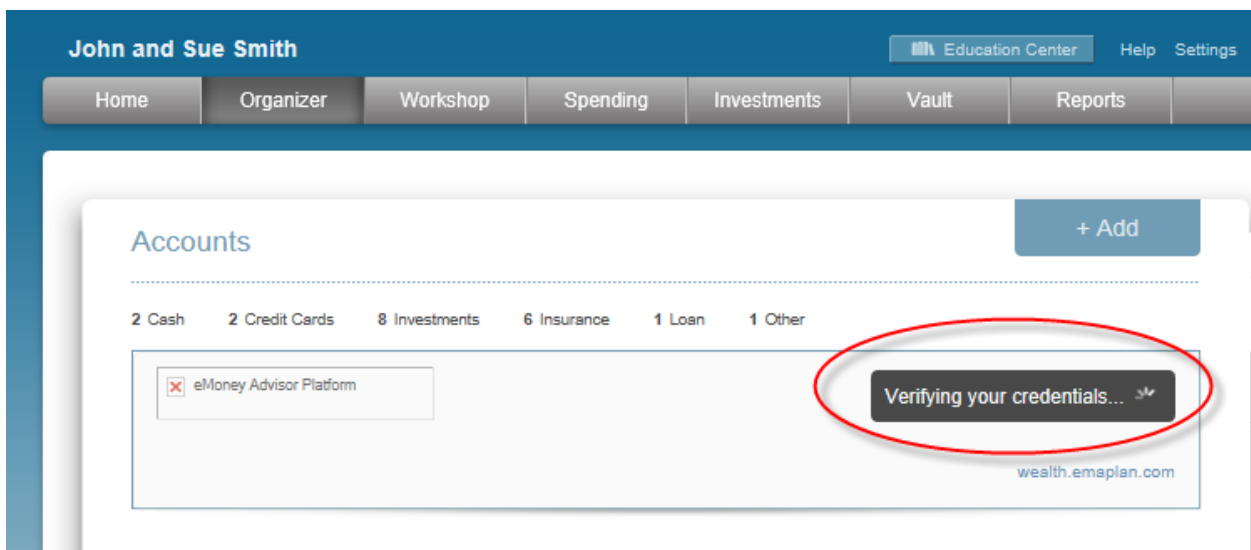
1. eMoney - alpha/ema - Client Access
2. eMoney Advisor Platform
3. Budget Bank
4. eMoney Financial
5. Reliance Money
6. GE Money - Loans
7. Life Insurance - Cash Test

The second result, "eMoney Advisor Platform", is circled in red. Below the list is a "Close" button with a dropdown arrow.

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



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



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

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





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

**Accounts** + Add

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

✖ eMoney Advisor Platform

 delete  
  settings  
  find new  
  refresh