

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.

Welcome
John and Sue Smith

Education Center Help Settings Log out

Home Organizer Workshop Spending Investments Vault Reports

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NET WORTH TODAY
\$489,882
THIS MONTH -- --

INVESTMENTS TODAY
\$482,842
CHANGE² -- --

ACCOUNTS¹ **+ Add**

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.

Auto & Transport
Fees & Charges
Cash/ATM
More ▾

BUDGETS
Automatically create a budget based on your recent spending averages.
Create a Budget

PROTECTION

Auto
eMoney - alpha/ema - Clie...

Group Short Term
eMoney - alpha/ema - Clie...

Homeowner's
eMoney - alpha/ema - Clie...
More

TOUR GUIDE
Get an overview of how to get started with your personal financial website.
GET STARTED ▶

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 a "Close" button. The main content area has 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 next to the input field. To the right of the search box is a vertical sidebar with icons for a dollar sign, a house, and a person. Below the search box is a "Close" button with a dropdown arrow.

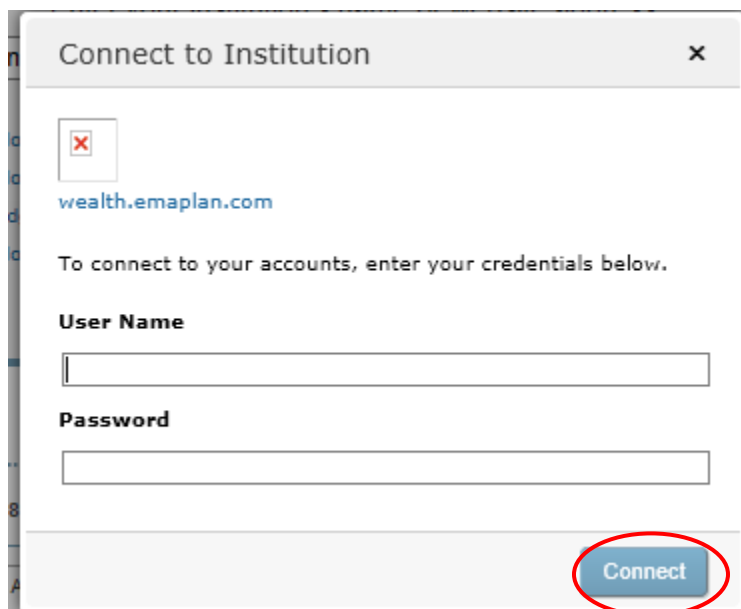
3. From the list, select your institution.

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

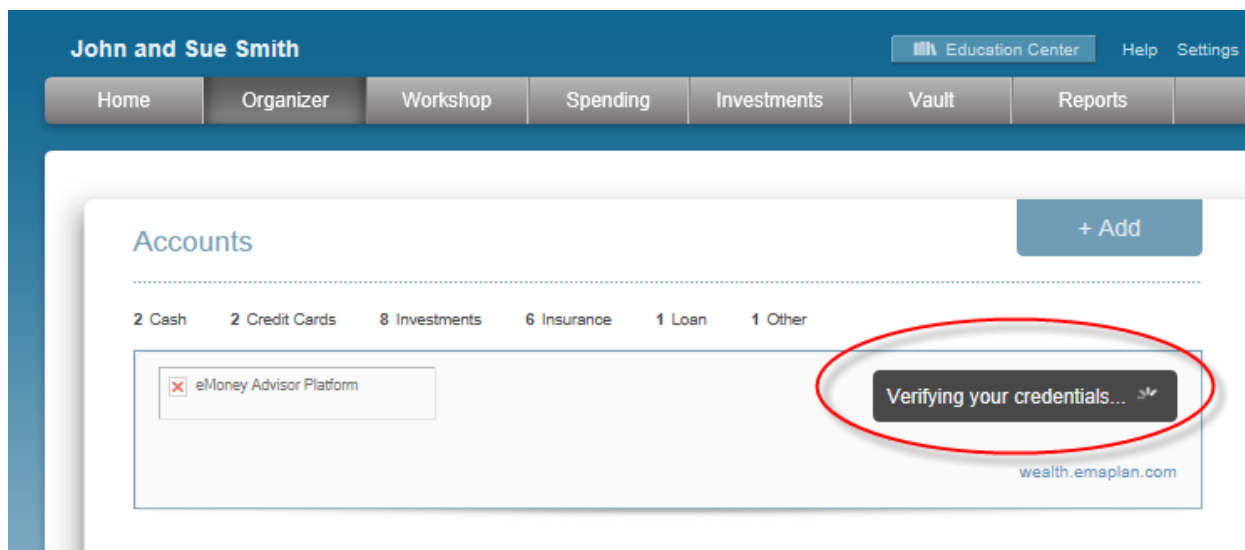
- 1. eMoney - alpha/ema - Client Access
- 2. eMoney Advisor Platform
- 3. Budget Bank
- 4. eMoney Financial
- 5. Reliance Money
- 6. GE Money - Loans
- 7. Life Insurance - Cash Test

The second result, "eMoney Advisor Platform", is circled in red. The "Close" button is still visible at the bottom right.

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.

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

6. 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