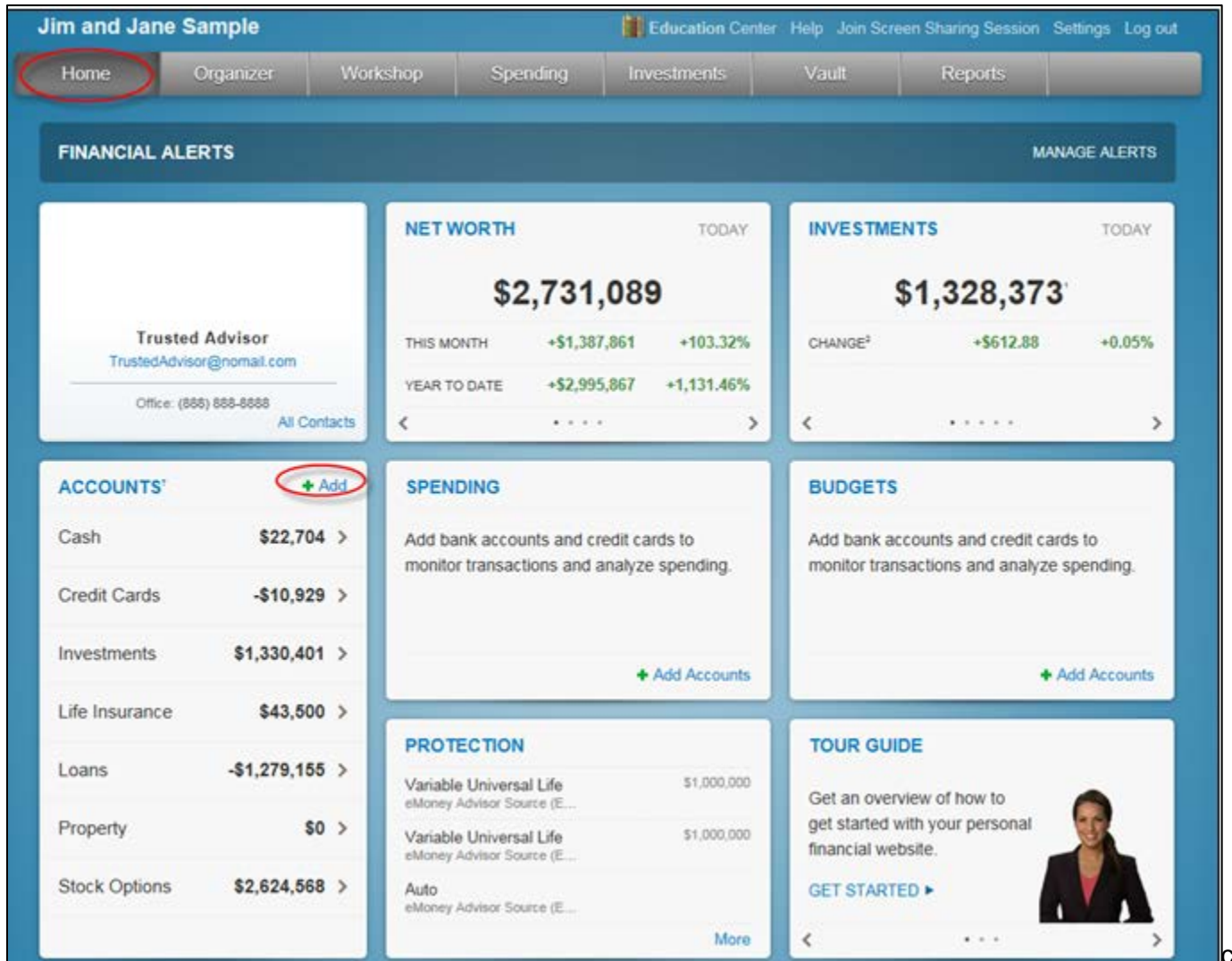


In this user guide we will demonstrate how to set up your Connections.

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



Jim and Jane Sample | Education Center | Help | Join Screen Sharing Session | Settings | Log out

Home | Organizer | Workshop | Spending | Investments | Vault | Reports

FINANCIAL ALERTS | MANAGE ALERTS

Trusted Advisor
TrustedAdvisor@nomail.com
Office: (888) 888-8888 | All Contacts

NET WORTH TODAY
\$2,731,089
THIS MONTH: +\$1,387,861 (+103.32%)
YEAR TO DATE: +\$2,995,867 (+1,131.46%)

INVESTMENTS TODAY
\$1,328,373
CHANGE²: +\$612.88 (+0.05%)

ACCOUNTS' | **+ Add**

Cash	\$22,704	>
Credit Cards	-\$10,929	>
Investments	\$1,330,401	>
Life Insurance	\$43,500	>
Loans	-\$1,279,155	>
Property	\$0	>
Stock Options	\$2,624,568	>

SPENDING
Add bank accounts and credit cards to monitor transactions and analyze spending.
+ Add Accounts

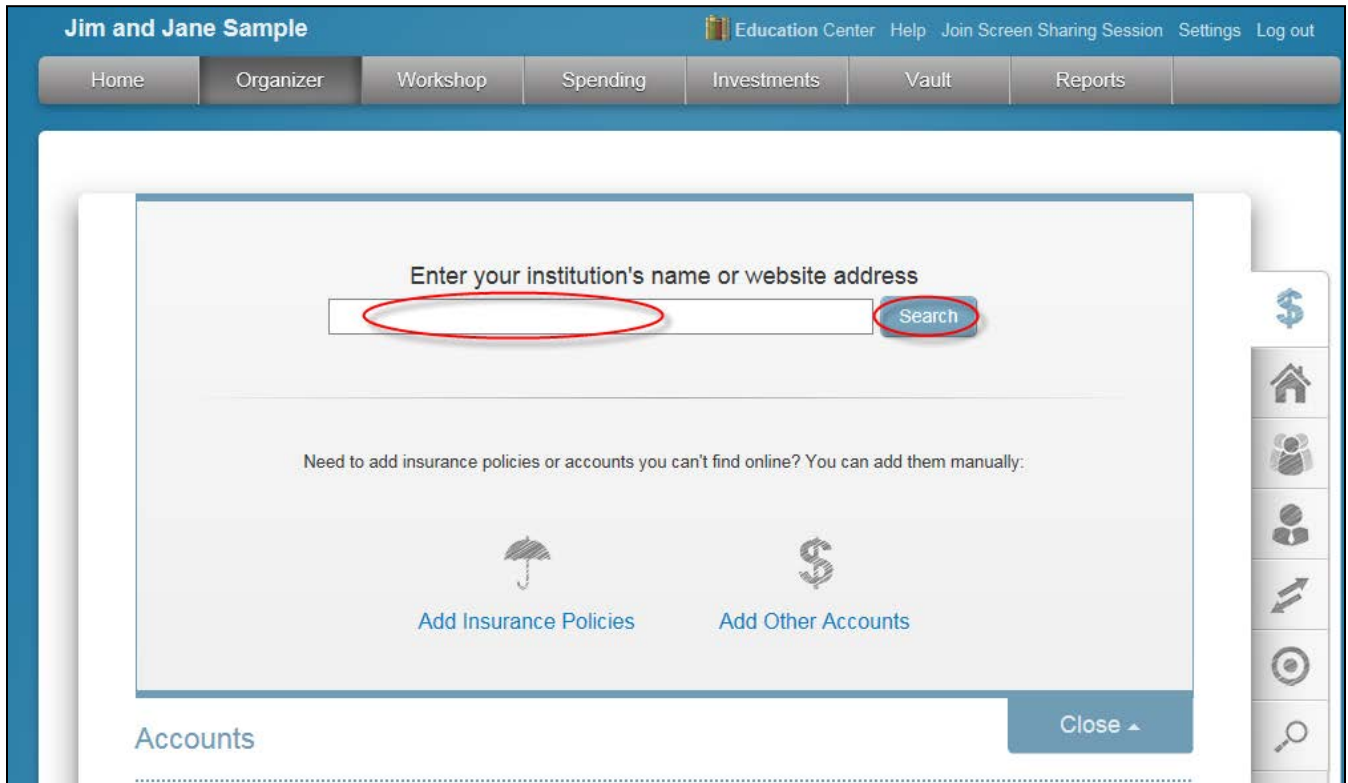
BUDGETS
Add bank accounts and credit cards to monitor transactions and analyze spending.
+ Add Accounts

PROTECTION

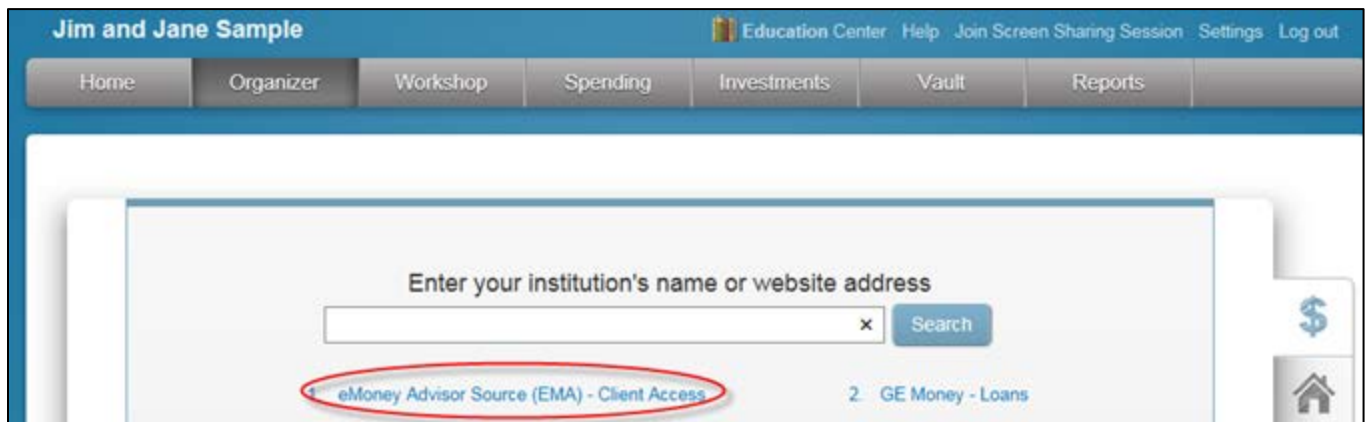
Variable Universal Life	\$1,000,000
eMoney Advisor Source (E...	
Variable Universal Life	\$1,000,000
eMoney Advisor Source (E...	
Auto	
eMoney Advisor Source (E...	

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

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.



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

Connect to Institution ×

View an important message about this institution.

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

6 Cash 6 Credit Cards 12 Investments 13 Insurance 3 Loans 3 Others

Verifying your credentials... ↻

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

† Orion Investments	Taxable Investment	02/05/2015 10:44AM	\$40,249
† Permanent Life Insurance	Life Insurance - Variable Univers...	02/05/2015 10:44AM	\$14,500
Blue Credit Card	Loan - Credit Card	02/05/2015 10:44AM	-\$2,368
† Fidelity 401(k)	Qualified Retirement - Traditional...	02/05/2015 10:44AM	\$40,249
Stock Options	Stock Option	02/05/2015 10:44AM	\$1,239,505

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

The screenshot shows the 'Accounts' page with a '+ Add' button in the top right. Below the title, there are counts for different account types: 8 Cash, 8 Credit Cards, 15 Investments, 19 Insurance, 4 Loans, and 4 Others. At the bottom right, there is a toolbar with four icons: a trash can for 'delete', a gear for 'settings', a magnifying glass for 'find new', and a circular arrow for 'refresh'. These icons are circled in red.