Finding My Financial Information…

Do you ever feel overwhelmed by all the passwords, websites, and paperwork in the mail? This document will help you navigate and find what is important to you.

The main location where everything can be found is on our website:

wealthclarity.com

It looks like this:

Clicking on Client Login will take you to Account View.

When you click on the Planning Portal takes you to eMoney.

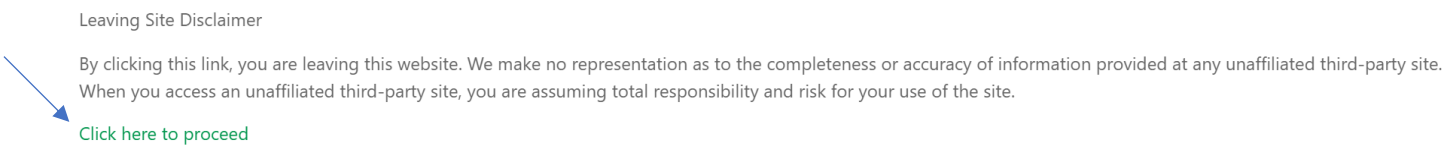
Account View: This is a secure way to view statements and review transactions for the accounts managed by Tyler.

eMoney: Where ALL OF YOUR ACCOUNTS can be linked and viewed. You can work directly with Tyler on eMoney to create a financial plan and move toward your financial goals.

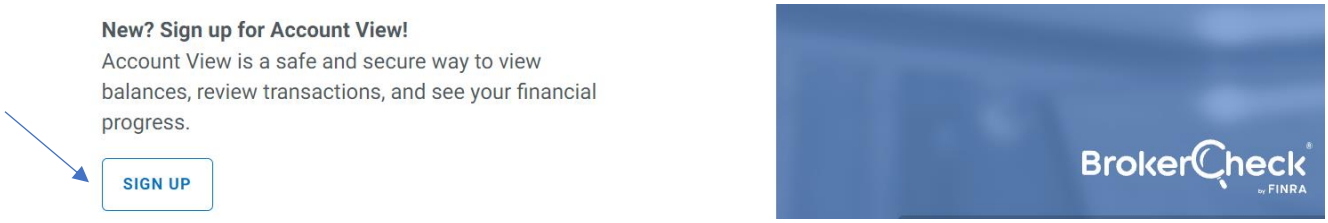
WEALTHCLARITY

First time users – Creating an Account View Profile

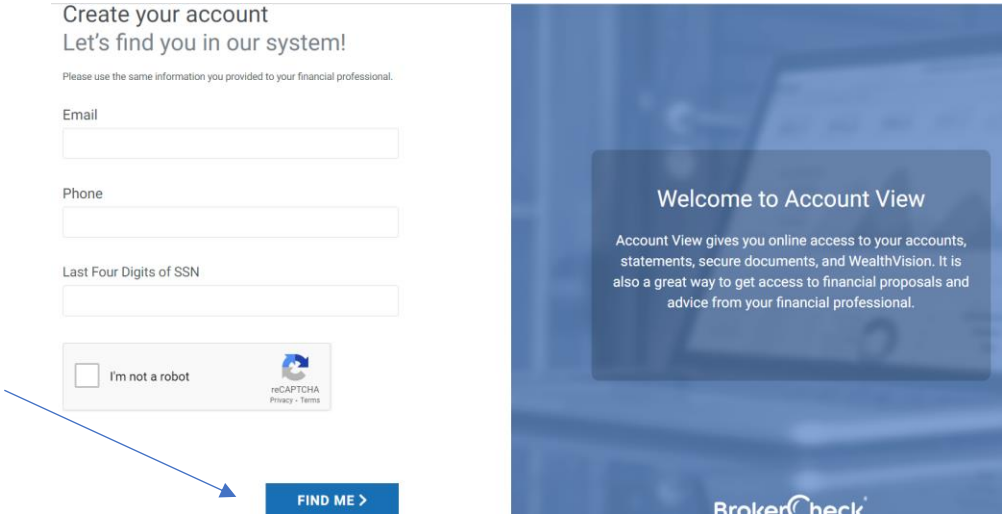
From the Client Login link on our website, click on Account View, and you will see this:



1. From the Account View home page, choose **Sign Up** within the New? – it's lower on the page.



2. Enter your email address, phone number, last four digits of SSN, and zip code.
3. Choose **Find Me** to be located in the system.

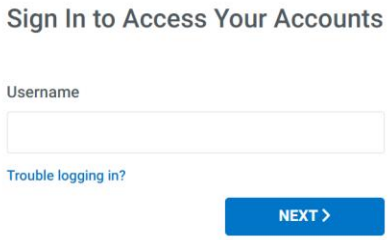


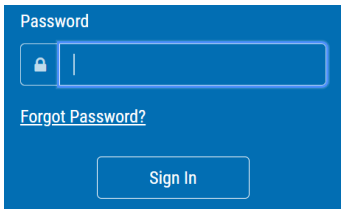
4. When the user is found, the website prompts you to create a password. The username will be the same as the email address provided.
5. Once prompted, accept the terms and conditions and choose a multi-factor authentication method. A one-time passcode is called or texted to your device.
6. Once completed with multi-factor authentication, you will be sent to the Account View page and can log in using your username (email provided) along with the password you created.

Already registered – Logging into your Account View

Client Login:

1. Choose Account View, read the disclaimer and click on Click here to proceed.
2. Enter your username (email on file) and choose **Next.**





3. Once prompted, enter your password. Forgotten passwords can be recovered by choosing Forgot Password. Now choose **sign in**. You can now see your financial account view.

Resetting Password

To reset your Account View password, complete the following steps:

1. From the Account View home page, enter your username and choose **Next**.
2. Once prompted, enter the last four digits of your SSN.

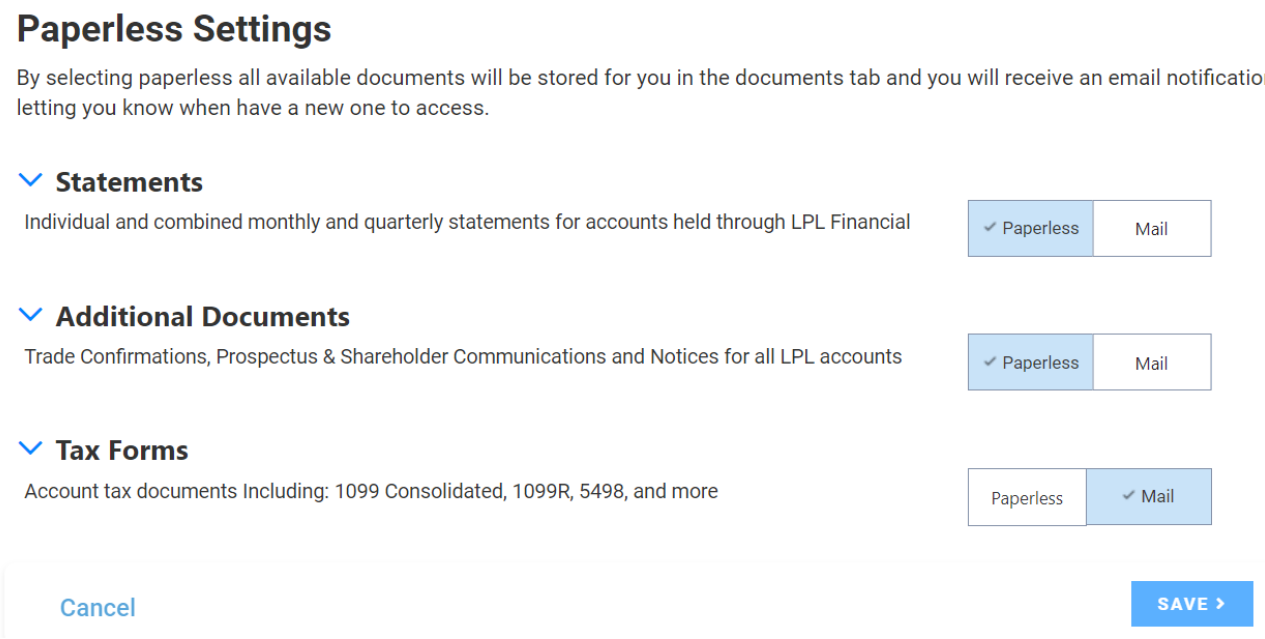
3. After the system verifies that the information matches, you are prompted to send a one-time passcode to the phone number on file for verification.
4. Once verified, you can reset your passcode.

Signing Up to Go Paperless

You can elect for paperless delivery for your account statements, additional documents (such as trade notifications and prospectus info), and tax documents. In order to do this, follow these steps after getting access to your accounts on Account View:

1. Click on your name in the upper right corner, then click on Preferences.

2. Select documents that you want to receive via email. This picture shows my recommendation on going paperless. Don't forget to hit **SAVE** at the bottom.



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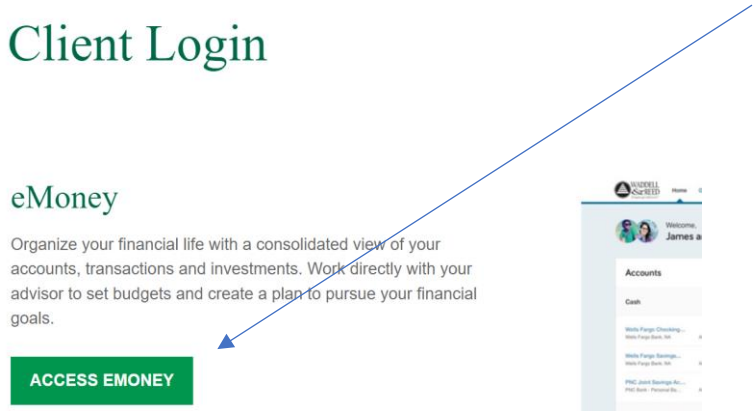
Logging into eMoney

To log into eMoney, go again to our website and click on Planning Portal.

Choose eMoney and when you see this picture, click on Access eMoney.



Enter your username (email on file) and then create a password (you might want to use the same password for Account View and eMoney). Choose **Click here to proceed** which will take you to eMoney. Work directly with your financial advisor to create a plan to pursue your financial goals.