



## 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](http://wealthclarity.com)

**It looks like this:**

**Clicking on Client Login will take you to Account View.**



Home   About   LPL   Resources   Planning Portal   Contact Us

**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.

## 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:

Leaving Site Disclaimer

By clicking this link, you are leaving this website. We make no representation as to the completeness or accuracy of information provided at any unaffiliated third-party site. When you access an unaffiliated third-party site, you are assuming total responsibility and risk for your use of the site.

[Click here to proceed](#)

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

### New? Sign up for Account View!

Account View is a safe and secure way to view balances, review transactions, and see your financial progress.

[SIGN UP](#)



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.

### Create your account Let's find you in our system!

Please use the same information you provided to your financial professional.

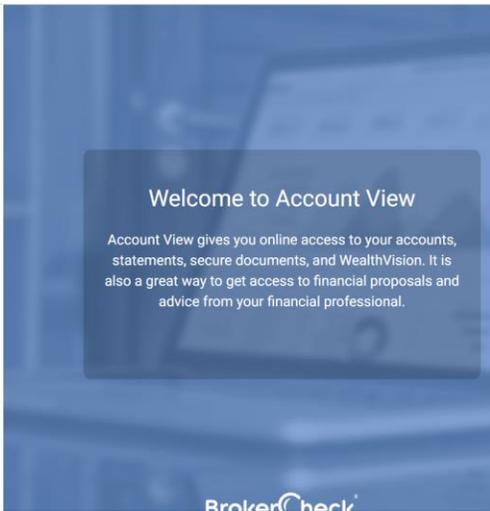
Email

Phone

Last Four Digits of SSN

I'm not a robot   
reCAPTCHA  
Privacy - Terms

[FIND ME >](#)



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:

720-613-0088    contactus@wealthclarity.com    Client Login    Schedule an Appointment



- Home
- About
- LPL
- Resources
- Planning Portal
- Contact Us

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

### Sign In to Access Your Accounts

Username

[Trouble logging in?](#)

NEXT >

Welcome to Account View

Account View gives you online access to your accounts, statements, secure documents, and WealthVision. It is also a great way to get access to financial proposals and advice from your financial professional.

Password

[Forgot Password?](#)

Sign In

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.

### Paperless Settings

By selecting paperless all available documents will be stored for you in the documents tab and you will receive an email notification letting you know when have a new one to access.

#### ✓ Statements

Individual and combined monthly and quarterly statements for accounts held through LPL Financial

✓ Paperless	Mail
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#### ✓ Additional Documents

Trade Confirmations, Prospectus & Shareholder Communications and Notices for all LPL accounts

✓ Paperless	Mail
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#### ✓ Tax Forms

Account tax documents Including: 1099 Consolidated, 1099R, 5498, and more

Paperless	✓ Mail
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[Cancel](#) **SAVE >**



## Logging into eMoney

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



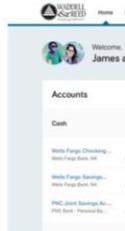
Choose eMoney and when you see this picture, click on Access eMoney.

## Client Login

### eMoney

Organize your financial life with a consolidated view of your accounts, transactions and investments. Work directly with your advisor to set budgets and create a plan to pursue your financial goals.

[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.

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