Setting up and Navigating your Avantax- eMoney account

1. Our office will send you a link to set up your Avantax - eMoney account.
2. Click on link and you will need to add your ss# or client id# and date of birth.
3. Check box that you are not a robot and answer questions about images and click verify.
4. Confirm your phone number to receive password. Select text or phone call.
5. Your eMoney user id will be displayed. Make a note of this as you will need it each time you sign in. Your password will have either be texted to you or you will receive a phone call with your password.
6. Click on launch Emoney. Enter phone # you would like to receive verification code. This is an extra layer of protection for you and your account.
7. Either set up a back up contact number or skip this for now.
8. Accept terms.
9. You will now have access to your account info and can navigate around your account.
10. If you have any questions call Dawn Clements at 770-396-6556 or email [Dawn@ClementsFinancialServices.com](mailto:Dawn@ClementsFinancialServices.com).
11. For account access go into [www.ClementsFinancialServices.com](http://www.ClementsFinancialServices.com) and click on Avantax eMoney Login in the upper right corner. Click on “Click here to proceed” to be directed to the Avantax eMoney login page.
12. This account has your sensitive financial account information so it will require the password to be reset every 60 days for your protection. Sometimes it will be more often if you are signing in on multiple devices.

Note: Wealthscape Investor will give you more in-depth information regarding your portfolio performance and offers charts for your brokerage or advisory accounts.

Step by Step Instructions for logging into Wealthscape Investor

1. Click on Wealthscape Investor login located at top right of website [www.ClementsFinancialServices.com](http://www.ClementsFinancialServices.com). Click on “Click here to proceed” to be directed to the Wealthscape Investor login page. You will see a box with Avantax Investment Services written above it and Powered by Wealthscape Investor in small letters to the right.
2. Log in using the 10-digit number User ID assigned to you when you registered and then enter the password you set up. If you have not set this up click on Register that is below the Sign In button.
3. Once signed on, you should land on your homepage which is your Portfolio overview. This will show a listing of account types in your portfolio (i.e., Retirement, Managed, Investments, etc.) If you do not see your portfolio screen after logging in, click on the Accounts icon on the left side of the screen and select Portfolio.
4. Select the account type that you want to review. This will then show the specific account numbers.
5. Click on “details” next to the account number that you want to view. Account specifics will populate and be categorized under different tabs.
6. You will see a list of your stocks. This will include price, quantity, gain and loss.
7. To look at an individual stock click onto the stock name and select chart. The most popular one to use is mountain. You can select up to 10 years to view history of stock.

Still have questions? Please contact Dawn at Dawn@ClementsFinancialServices.com or contact her at 770-396-6556.