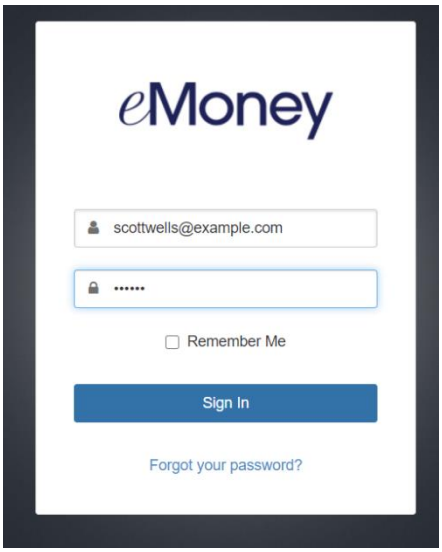
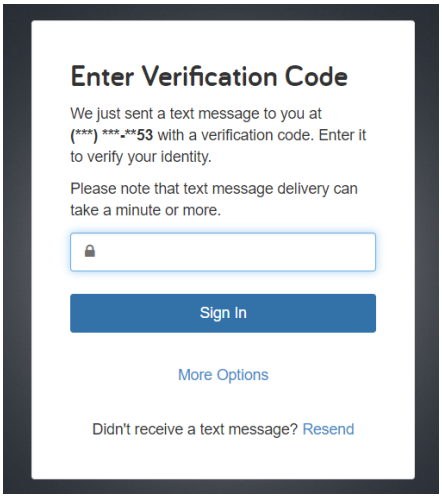
Accessing your eMoney Account Online

1. Search “emaplan login” in your browser or go directly to https://wealth.emaplan.com/ema/SignIn?ema

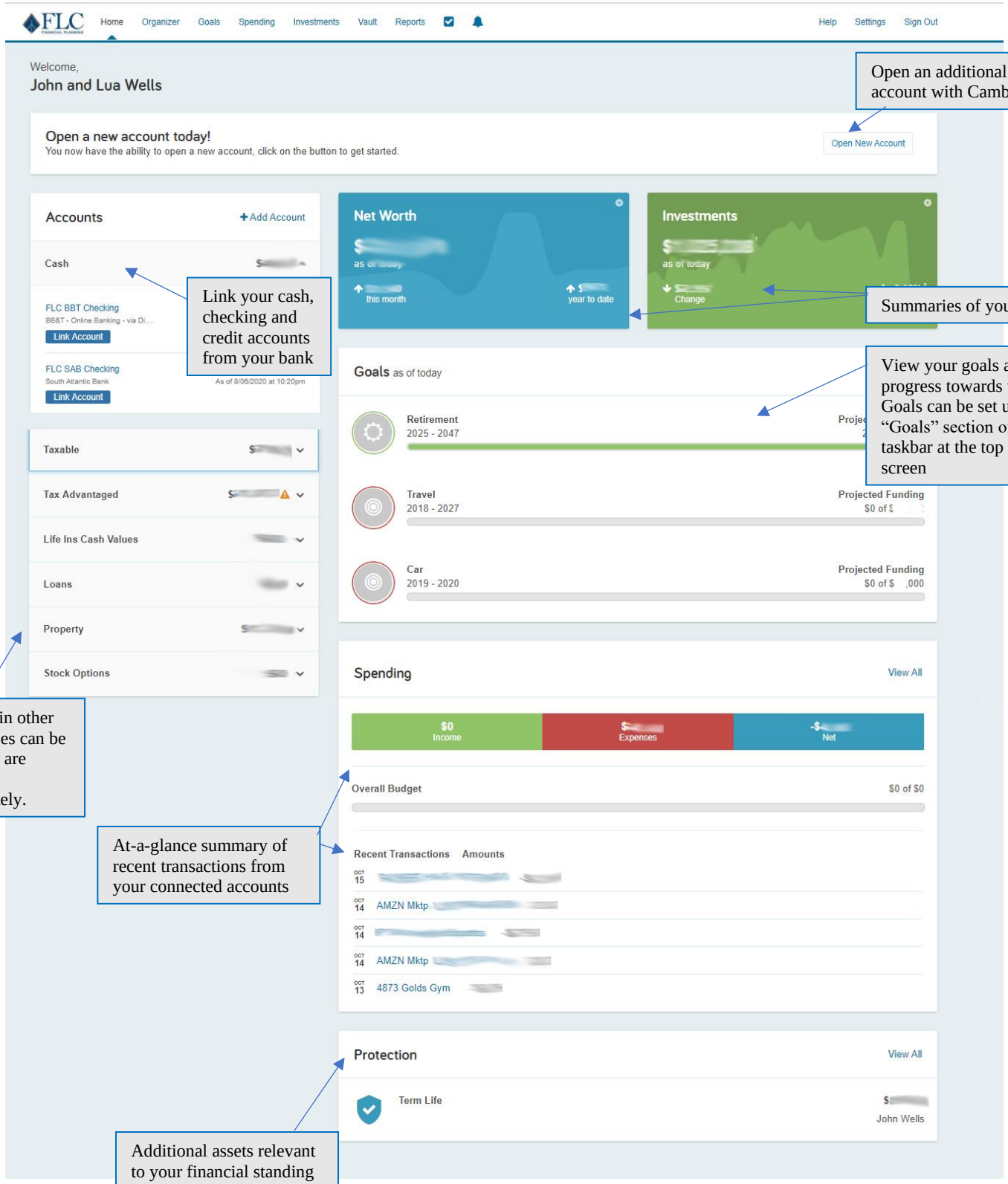
2. Enter your username and password.



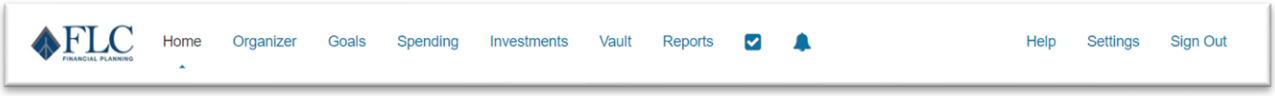
3. If you have set up 2-factor authentication, you will be sent a temporary code to your phone/contact method of choice. Enter the 6-digit number when prompted to complete your login.



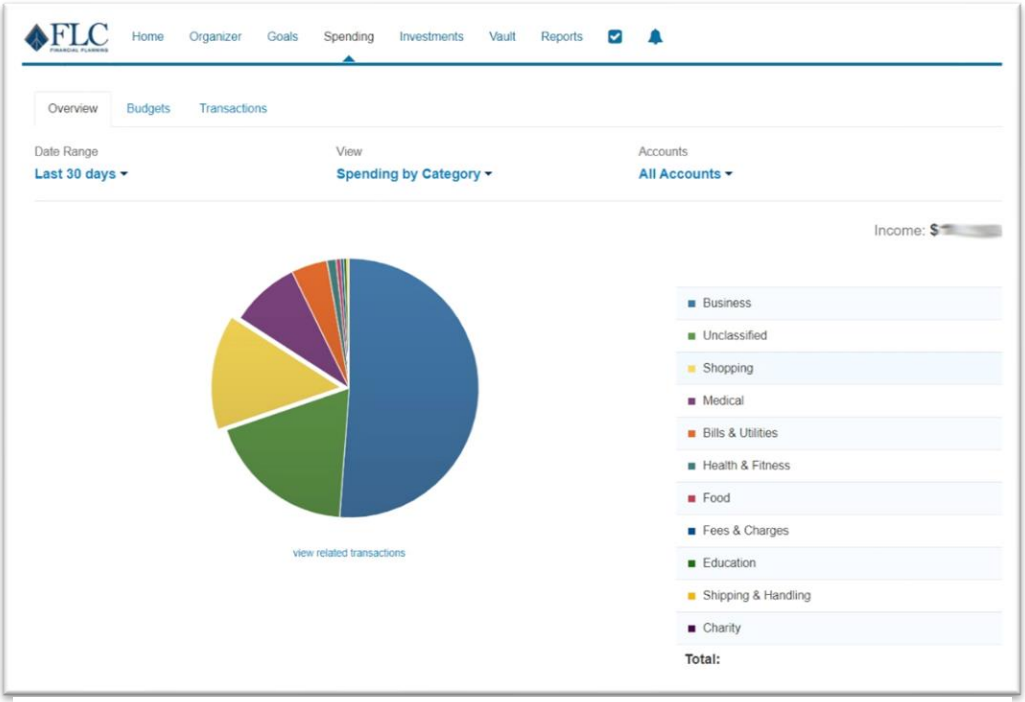
4. Below is an example of what your Home Page can look like:


FLC
Home
Organizer
Goals
Spending
Investments
Vault
Reports
Help
Settings
Sign Out
Welcome,
John and Lua Wells
Open an additional account with Cambridge
Open a new account today!
You now have the ability to open a new account, click on the button to get started.
Open New Account
Accounts
+ Add Account
Cash
FLC BBT Checking
BB&T - Online Banking - via Di...
Link Account
FLC SAB Checking
South Atlantic Bank
Link Account
As of 8/06/2020 at 10:20pm
Link your cash, checking and credit accounts from your bank
Net Worth
this month
year to date
Investments
as of today
Change
Summaries of your Assets
Goals as of today
Retirement
2025 - 2047
Travel
2018 - 2027
Projected Funding
$0 of $
Car
2019 - 2020
Projected Funding
$0 of $,000
View your goals and your progress towards them. Goals can be set using the "Goals" section of the taskbar at the top of this screen
Taxable
Tax Advantaged
Life Ins Cash Values
Loans
Property
Stock Options
Accounts in other asset classes can be added and are organized appropriately.
Spending
View All
$0
Income
Expenses
Net
Overall Budget
$0 of $0
Recent Transactions
Amounts
OCT 15
OCT 14
AMZN Mktp
OCT 14
OCT 14
AMZN Mktp
OCT 13
4873 Golds Gym
At-a-glance summary of recent transactions from your connected accounts
Protection
View All
Term Life
John Wells
Additional assets relevant to your financial standing can be added, such as insurance policies

5. Make your account complete using the categories included in the task bar at the top of the page.



   a. **Home** is your dashboard, as seen previously
   b. In **Organizer** you can enter critical high-level information to get started this includes:
      a. the contact information for yourself and additional parties (such as a spouse)
      b. Property and other tangible assets
      c. Business contacts (such as your Financial Planner).
      d. Financial data, including income, regular expenses, and expected future expenses
      e. Risk Tolerance is presented as a questionare that will suggest a portfolio based on your risk tolerance.
   c. The **Goals** section allows you to create new financial goals, such as education, retirement, or purchase of a new home. You can also view your long-term progress more in-depth than on the Home page.
   d. **Spending** takes data that you have input, along with the transactional data, to present a budget breakdown of how you are spending your money. You can also use this tool to enter a budget for yourself to help you achieve your goals.



A budget breakdown example from Spending

   e. **Investments** tracks all accounts that you or your financial planner have entered and, using data provided by Cambridge Investment Research and Reuters, provides updates on account value and tracks investment changes.

f. The **Vault** allows you to upload documents. You can keep your documents private, or open them to be shared with other parties such as your Financial Planner.
g. You can view and print **Reports** under their tab. eMoney automatically builds reports like your Balance Sheet and Cash Flow, and allows you to customize the time periods covered.
h. The square with a check is your **Tasks** section. Tasks can be assigned by you or your Financial Planner. Once completed, tasks will disappear from your list but can still be viewed by clicking “Show Completed Tasks.”
i. The bell is your **Alerts** section. You can manage alerts from there, or go to Settings on the far right of the task bar to customize what you want to see and how you want to receive it.