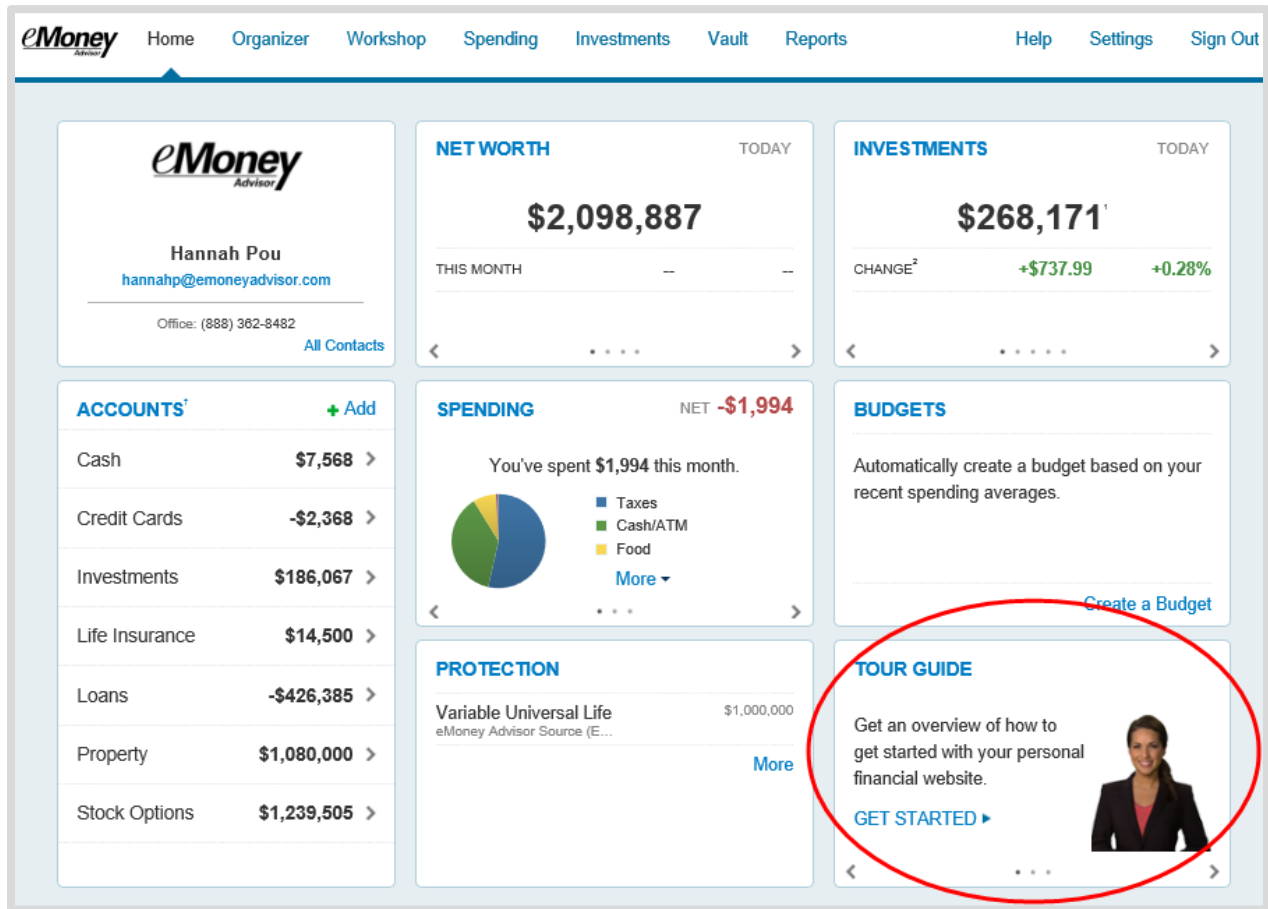


This training guide provides and overview of your new Wealth Management System portal! This site provides you with the tools to organize your financial life. Using this wealth management portal will help you stay connected with your finances in one simple consolidated view.

Before your first login, you will be prompted to establish 3 security questions.

1. From your financial Home page, you will notice a tour guide in the bottom right tile. These brief videos will walk you through the different areas of this portal.



Your **Home** page is a living snapshot of your financial wellbeing. The Home page is a high-level view of your financial information. This page is divided into separate tiles that represent the information contained within a particular section of the application.

## Wealth Management System Overview

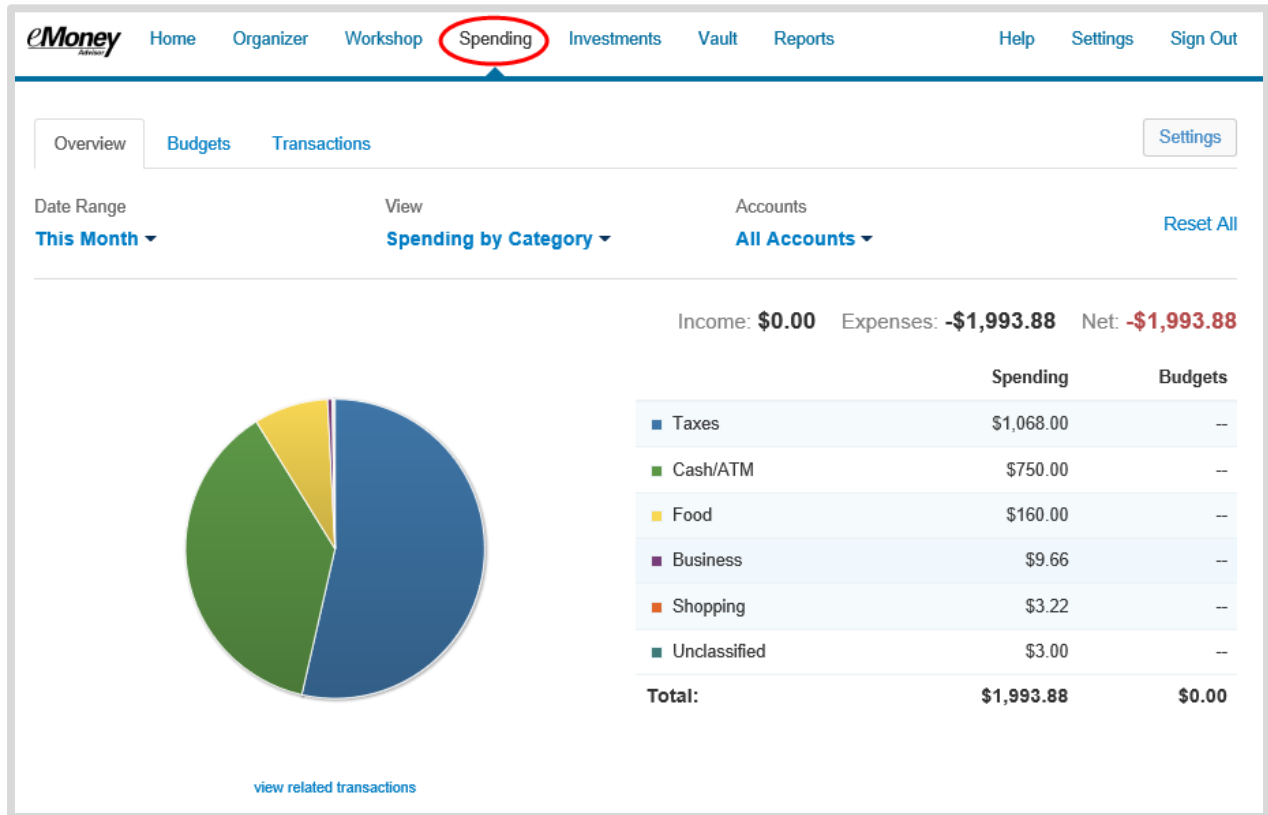
- The **Organizer** will help you to consolidate all of your important financial information into one place. Click the different sections to add and edit the related information. Here you can add your accounts, financial data, people and property.

The screenshot displays the 'emX' Wealth Management System Organizer interface. At the top, there is a navigation bar with the following items: Home, Organizer (selected), Spending, Investments, Vault, Reports, Help, Settings, and Sign Out. On the left side, there is a vertical menu with the following categories: Accounts, Professional Contacts, Income, Expenses, and Savings, Future Goals, Financial Priorities, and Risk Tolerance. The main content area is divided into several sections:

- Profiles:** Two profiles are shown side-by-side.
  - Charles Buckingham:** (610) 555-1313, hannahp@emoneyadvisor.com, 3/19/1960, Owner at Buckingham Engineering.
  - Kristine Buckingham:** (610) 555-1414, KBuckingham@mlh.org, 5/30/1963, Bryn Mawr Hospital.
- People:** A section titled 'People' with an 'Add Person' button. It contains two profile cards: Adam (AB) and Jack (JB).
- Property:** A section titled 'Property' with an 'Add Property' button. It contains five property cards:
  - Artwork and Jewelry (purple background, diamond icon)
  - Bryn Mawr Home (green background, house icon)
  - Buckingham Engineering (orange background, building icon)
  - Cars and Household Furnishings (purple background, diamond icon)
  - Ocean City Condo (green background, house icon)

## Wealth Management System Overview

3. The **Spending** tab gives you a clear view of what you're spending each month. If there is no information on this screen, it's because a bank account or credit card needs to be added to Accounts in your Organizer. Spending includes an Overview tab, Budgets tab, and Transactions tab. Use these pieces together to create the most accurate view of your spending and your current budget.



## Wealth Management System Overview

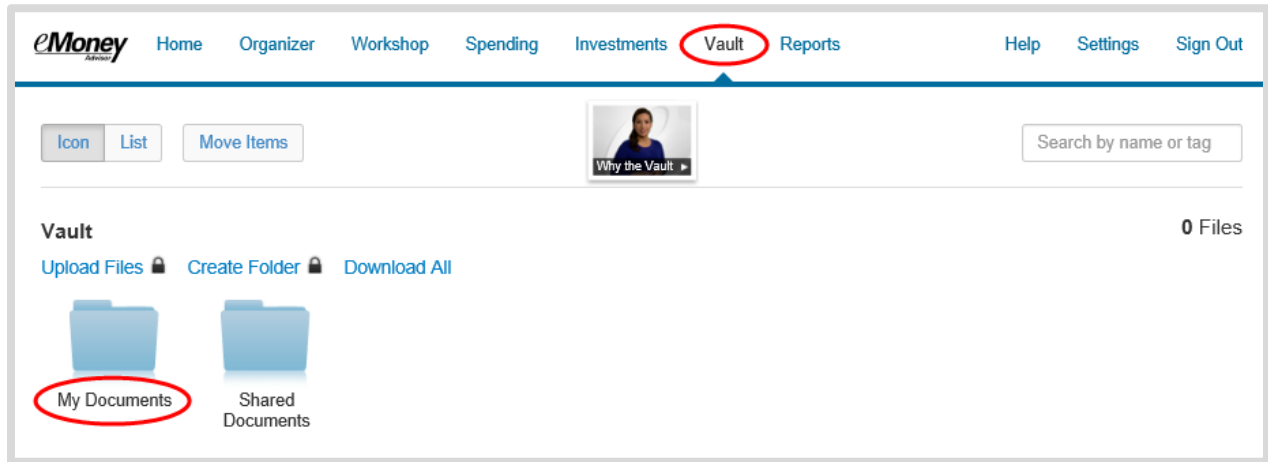
4. The **investments** tab is made up of four components: Summary, Allocation, Analysis, and Transactions. These will provide you with an overall view of your investments as well as the ability to drill into individual accounts & asset breakdowns.

The screenshot displays the eMoney Wealth Management System interface. The top navigation bar includes Home, Organizer, Workshop, Spending, **Investments**, Vault, Reports, Help, Settings, and Sign Out. Below this, the 'Investments' section is active, showing tabs for Summary, Allocation, Analysis, and Transactions, along with a Research button. A dropdown menu under 'Accounts' is open, highlighting 'All Investments'. The main content area shows a summary of the current value at \$268,171.04, with sub-totals for Cash (\$7,680.00), Margin (\$1.00), and Holdings (\$260,490.04). A 'Today's change' of +\$737.99 (0.28%) is shown with an upward arrow. A 'Balance History' chart area contains a message: 'The selected account(s) don't have enough balance history data to chart.' Below this is a table of account holdings.

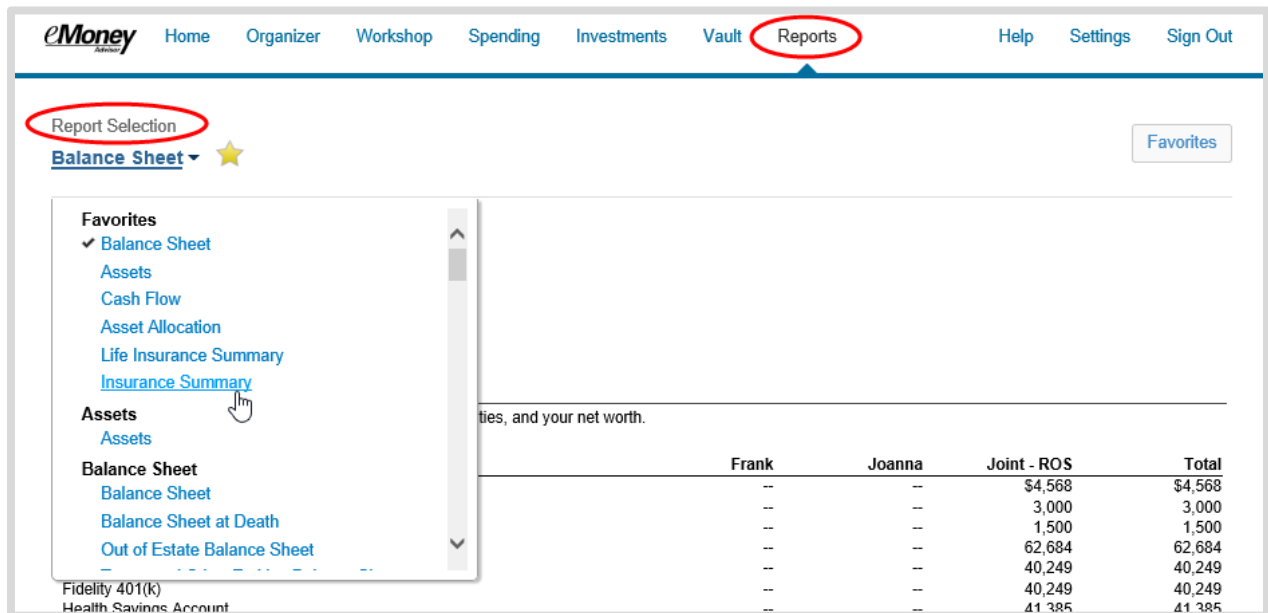
Account ▲	Positions As Of <sup>1</sup> ⚙	Cash ⚡	Margin ⚡	Holdings <sup>2</sup> ⚡	Current Value ⚡	Today's Change <sup>2</sup>	
						Value ⚡	Pct ⚡
† Any Account Type	05/10/2016 08:03AM	\$1,500.00			\$1,500.00		
† Fidelity 401(k)	05/10/2016 08:03AM	\$90.00		\$58,932.39	\$59,022.39	+\$32.00	0.05%
Fidelity Brokerage	05/10/2016 08:03AM	\$5,000.00	\$1.00	\$95,614.73	\$100,615.73	+\$673.99	0.67%
Health Savings Account	05/10/2016 08:03AM	\$1,000.00		\$47,010.53	\$48,010.53		
† Orion Investments	05/10/2016 08:03AM	\$90.00		\$58,932.39	\$59,022.39	+\$32.00	0.05%
† Taxable Investment	05/10/2016 08:11AM				\$0.00		
<b>Total</b>					\$268,171.04	+\$737.99	

## Wealth Management System Overview

5. The **Vault** tab is a repository which files are stored by your advisor for your review, and where you can store files. To upload a file, click the **Upload Files** link. The **My Documents** folder is hidden from your advisor. If you want your advisor to see a document, upload into the **Shared Documents** folder.



6. The **Reports** tab provides you with a series of reports about your financial situation.



## Wealth Management System Overview

- The **Settings** page is where you can set up alerts, update your security information (passwords & questions), and permission your advisor to see spending information through the Privacy tab.

**Privacy Settings**

This page allows you to manage your privacy settings. Use the controls below to determine how much access each individual has to your financial information.

	Spending Permissions		
	None Cannot view any spending data.	Limited Can view category spending and budgets.	Full Can view all data, including transactions.
<b>My Advisor</b>			
<b>Hannah Pou</b> Advisor	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>