

Personal Financial Website Overview

This user guide will provide an overview of the features on your Personal Financial Website. Your website is designed to give you the tools to organize your financial life and help you stay connected with your finances in one simple consolidated view.

Before your first login, you will be prompted to establish three security questions and set up 2-Factor Authentication.

Your **Home** page is a living snapshot of your financial wellbeing, providing a high-level view of your financial information. This page is divided into separate tiles that represent the information contained within a section of the website. Begin customizing your experience by clicking the **gear icon** in your Net Worth and Investments tiles.

PERSONAL FINANCIAL WEBSITE

Home Organizer Workshop Spending Investments Vault Reports Help Settings Sign Out

Welcome, Frank and Joanna Miller

Accounts	+ Add Account
Cash	\$25,000
Credit Cards	-\$3,643
Taxable	\$62,684
Tax Advantaged	\$451,838
Life Ins Cash Values	\$14,500
Loans	-\$426,385
Property	\$1,295,000
Stock Options	\$0

Net Worth

\$1,254,345
as of today

↓ \$581,222 this month ↓ \$421,668 year to date

Investments

\$726,180¹
as of today

↓ \$1,320² Change ↓ -0.18%² Change

Spending View All

\$0 Income	\$1,402 Expenses	-\$1,402 Net
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Overall Budget \$0 of \$0

Recent Transactions	Amounts
JUL 15 WAWA 666 TOWN	-\$80.00
JUL 14 Cash Withdrawal	-\$250.00
JUL 12 IRS	-\$356.00
JUL 10 STAPLES 99231 VALLEY FORGE	-\$3.22
JUL 8 PAYMENT	-\$1.00

Protection View All

	Whole Life	\$1,000,000 Frank Miller
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Personal Financial Website Overview

The **Organizer** will help you to consolidate all your important financial information into one place. You can click the **sections** on the left-hand side to add your accounts, financial data, people and property. The information within the Organizer will be used to populate other areas of the website, including the Home page.

The screenshot shows the 'Organizer' section of the Personal Financial Website. At the top, a navigation bar includes 'Home', 'Organizer' (highlighted with a red box), 'Workshop', 'Spending', 'Investments', 'Vault', 'Reports', and notification icons. On the right, there are links for 'Help', 'Settings', and 'Sign Out'. The main content area is divided into two columns. The left column contains a list of sections: 'Accounts', 'Professional Contacts', 'Income, Expenses, and Savings', 'Future Goals', 'Financial Priorities', and 'Risk Tolerance'. The right column features profiles for 'Frank Miller' and 'Joanna Miller'. Frank Miller's profile includes a phone number (867) 555-5555, email tedelstein@emoneyadvisor.com, birth date 6/1/1967, and occupation 'Owner at Buckingham Engineering'. Joanna Miller's profile includes a phone number (867) 333-3333, email jmiller@no-mail.com, birth date 3/20/1968, and occupation 'Nurse at Bryn Mawr Hospital'. Below the profiles, there are two sections: 'People' and 'Property'. The 'People' section shows five circular icons representing individuals: Peter (PM), Mary Beth (MM), Lucas (LM), Elaine (EG), and Stephanie (SM), with an 'Add Person' button. The 'Property' section shows four colored boxes representing assets: 'Cars' (purple with a diamond icon), 'Home' (green with a house icon), 'Jewelry' (purple with a diamond icon), and 'Vacation Mountain Home' (green with a house icon), with an 'Add Property' button.

Personal Financial Website Overview

The **Workshop** page can help you take a closer look at your retirement strategy, insurance protection, and education goals. Select a Workshop then verify you've completed the appropriate Organizer sections before you begin.

PERSONAL FINANCIAL WEBSITE Home Organizer **Workshop** Spending Investments Vault Reports [checkmark] [bell] Help Settings Sign Out

Getting Started with **Financial Workshop**

2051 Nancy is 81 Funding runs out 20 of 20 years funded

play video

- Are your investments properly allocated?
- Are your personal finances balanced?
- Are you saving enough for retirement?**
- Is your family protected?
- Are you saving enough for college?

Marcus Masters
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Contact Marcus

Site Map
Home
Organizer
Workshop
Spending

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Reports

Resources
Join Screen Sharing Session

Are you saving enough for retirement? 1 Intro 2 Your Strategy 3 Next Steps back to workshop

Take a look at your retirement strategy.
Find out how much your retirement will cost and see if you're on track to afford it.

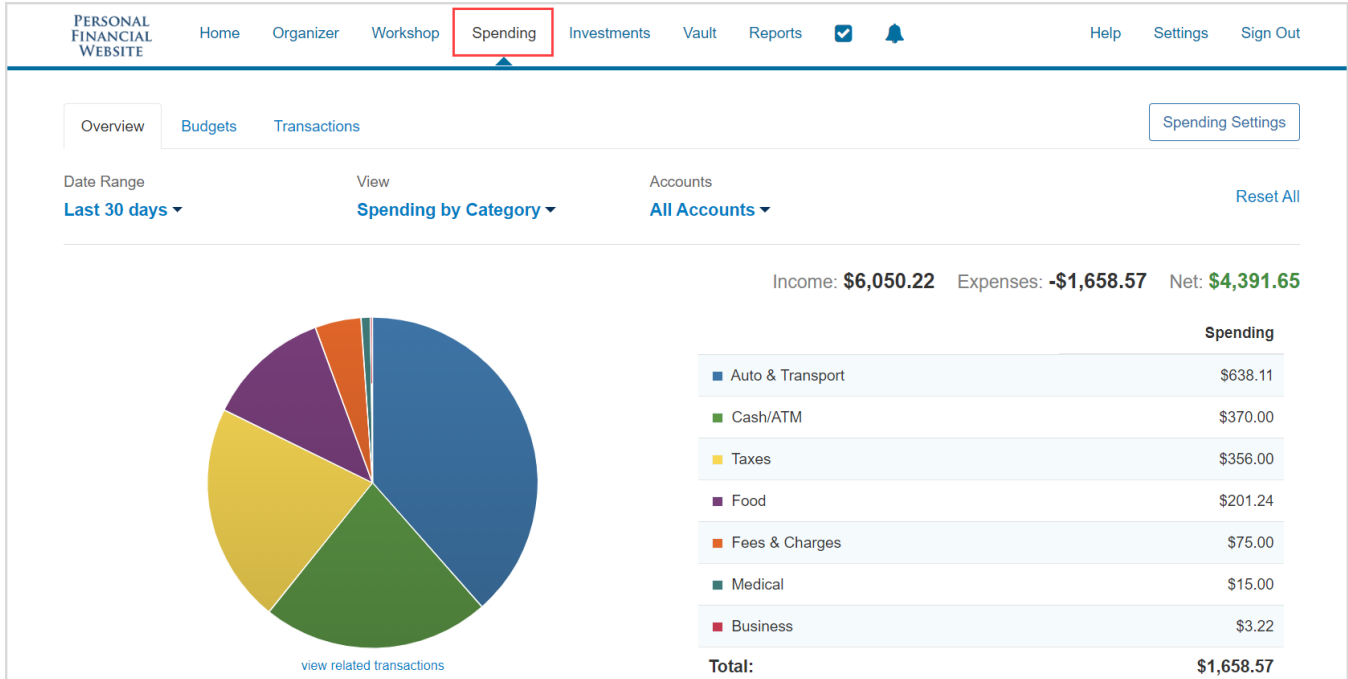
Before you begin
make sure these Organizer sections are complete:

- Accounts
- Family and Friends
- Income, Expenses, and Savings

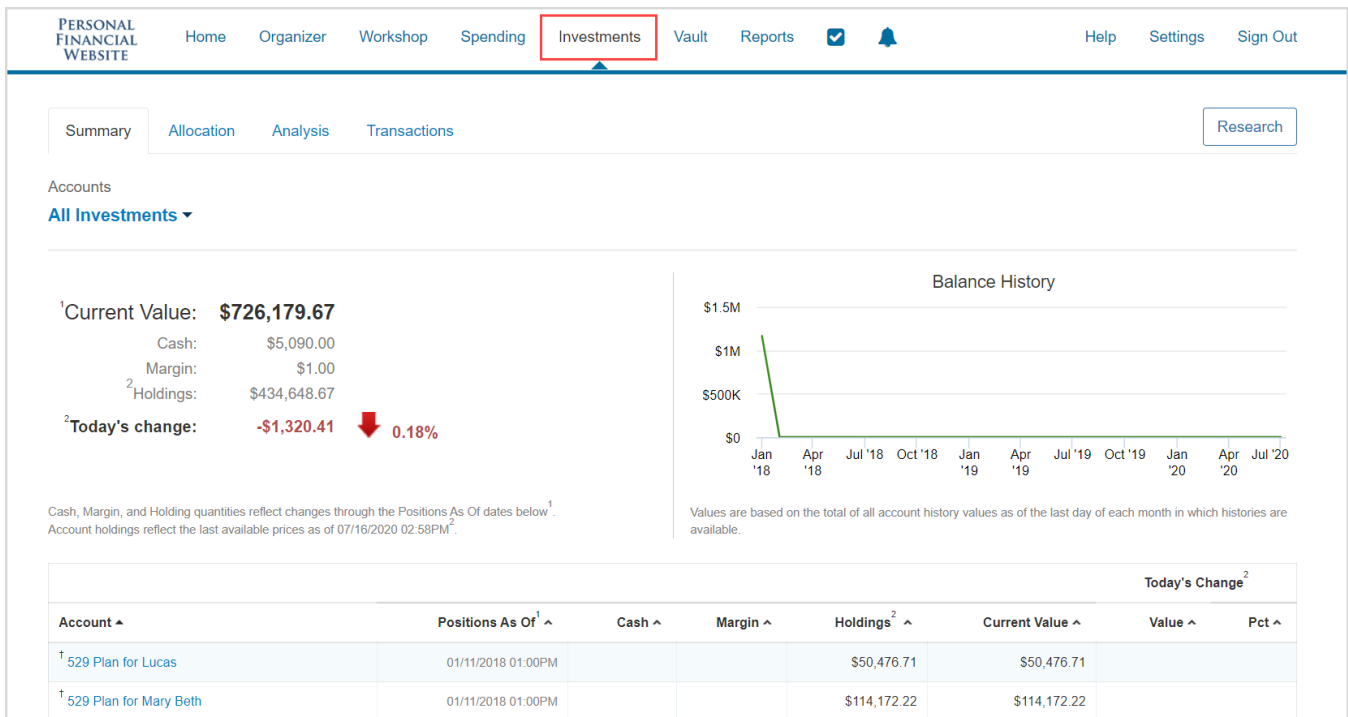
Begin

Personal Financial Website Overview

The **Spending** page gives you a clear view of what you're spending each month. This area includes an **Overview**, **Budgets** tab, and **Transactions** tab. Use these three tabs together to create an accurate view of your spending and your current budget. Note that if there is no information on this screen, it is because a bank account or credit card needs to be added to the Accounts section within in your Organizer.



The **Investments** page 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 view individual account activity and asset breakdowns.



Personal Financial Website Overview

The **Vault** is a secure, searchable repository in which files are stored by your Advisor for your review, and where you can store files. To upload a file, click either the My Documents or Shared Documents folder, then click **Upload Files**. The My Documents folder is hidden from your Advisor, however, if you want your Advisor to see a document, upload into the Shared Documents folder.

Vault

Files

search by name

Name	Size	Shared	Created
My Documents	0 Files		7/16/2020 at 6:18 pm
Shared Documents	0 Files		7/16/2020 at 6:18 pm

Usage: 0 B (0 B are private)

The **Reports** page provides you with a series of reports about your current financial situation.

Report Selection: **Balance Sheet**

	Frank	Joanna	Joint - ROS	Total
Assets	--	--	\$25,000	\$25,000
Asset Tax Type	--	--	62,684	62,684
Balance Sheet	40,249	--	--	40,249
Joanna's ROTH IRA (converted)	--	143,509	--	143,509
Home	--	103,431	--	103,431
Vacation Mountain Home	--	--	850,000	850,000
Cars	--	350,000	--	350,000
Jewelry	--	--	60,000	60,000
Whole Life Policy on Frank	--	35,000	--	35,000
	14,500	--	--	14,500
Total Assets:	54,749	631,940	997,684	1,684,373

Personal Financial Website Overview

The **Tasks** icon will alert you of any tasks assigned to you by your Advisor. Click **Complete** when you've finished the task to notify your Advisor.

PERSONAL FINANCIAL WEBSITE | Home | Organizer | Workshop | Spending | Investments | Vault | Reports | **Tasks** | Alerts | Help | Settings | Sign Out

Tasks Assigned to You Show Completed Tasks

Increase 403b Contributions Aug 15, 2020
 Hi Joanna - as discussed please touch base with your benefits department to make changes to your 403... [Show more](#) **Complete**

The **Alerts** icon allows you to view any triggered alerts. Click **Manage** to set up your Alert parameters.

PERSONAL FINANCIAL WEBSITE | Home | Organizer | Workshop | Spending | Investments | Vault | Reports | Alerts | **Alerts** | Help | Settings | Sign Out

Alerts Manage

REMINDER Oct 10
 October 9th - Annual Review

The **Settings** page is where you can set Alerts, update your Security information, such as passwords and security questions, and set your Privacy Settings which allows you to determine what level of access your Advisor has when viewing your Spending and Budgeting data.

PERSONAL FINANCIAL WEBSITE | Home | Organizer | Workshop | Spending | Investments | Vault | Reports | Alerts | Alerts | **Settings** | Sign Out

Alerts | Security | **Privacy**

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.

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