


Connecting Accounts

In this user guide we will demonstrate how to set up your Client Connections.

1. Click on **Add** in the Accounts section under the Home page.



Jim and Jane Sample | Education Center | Help | Join Screen Sharing Session | Settings | Log out

Home | Organizer | Workshop | Spending | Investments | Vault | Reports

FINANCIAL ALERTS | MANAGE ALERTS

emX

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NET WORTH TODAY

\$2,731,089

THIS MONTH: +\$1,387,861 (+103.32%)
YEAR TO DATE: +\$2,995,867 (+1,131.46%)

INVESTMENTS TODAY

\$1,328,373¹

CHANGE²: +\$612.88 (+0.05%)

ACCOUNTS[†] | **+ Add**

Cash	\$22,704 >
Credit Cards	-\$10,929 >
Investments	\$1,330,401 >
Life Insurance	\$43,500 >
Loans	-\$1,279,155 >
Property	\$0 >
Stock Options	\$2,624,568 >

SPENDING

Add bank accounts and credit cards to monitor transactions and analyze spending.

+ Add Accounts

BUDGETS

Add bank accounts and credit cards to monitor transactions and analyze spending.

+ Add Accounts

PROTECTION

Variable Universal Life eMoney Advisor Source (E...	\$1,000,000
Variable Universal Life eMoney Advisor Source (E...	\$1,000,000
Auto eMoney Advisor Source (E...	

More

TOUR GUIDE

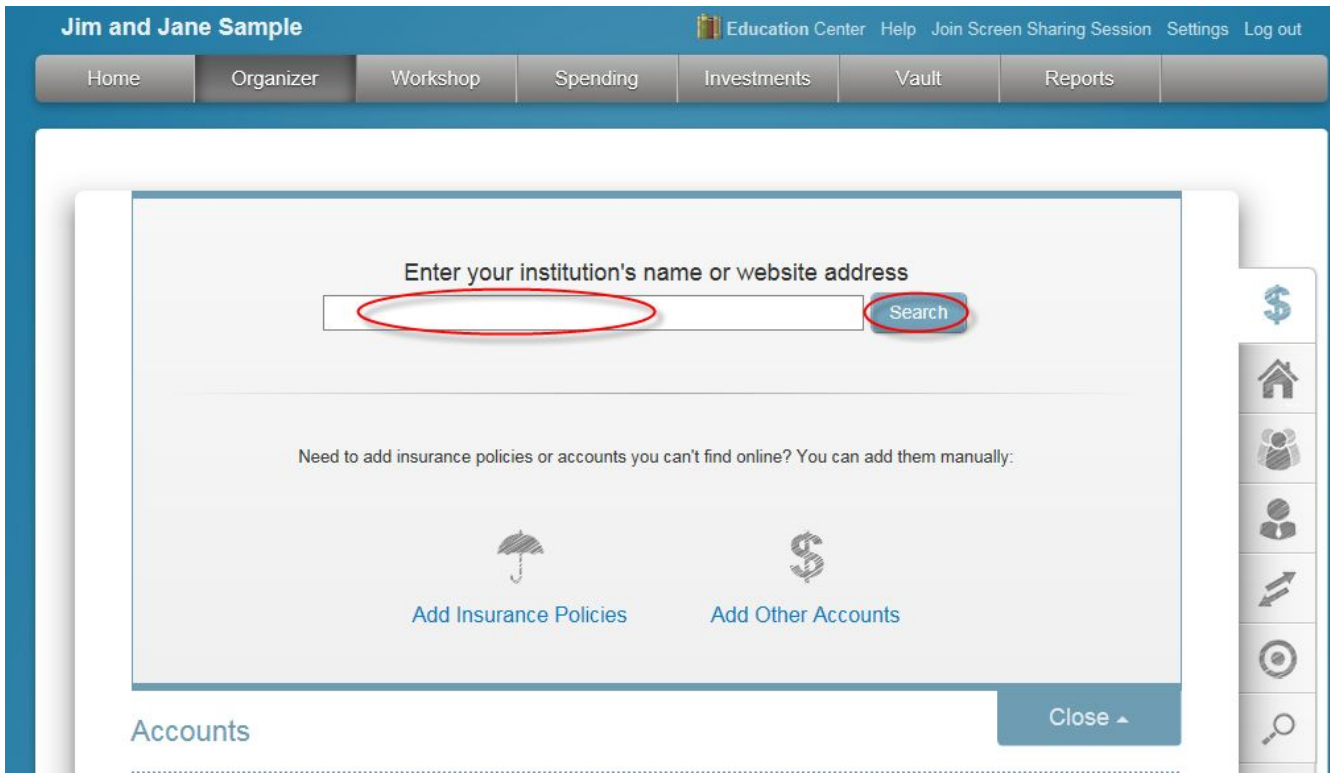
Get an overview of how to get started with your personal financial website.

GET STARTED ▶



Connecting Accounts

2. Enter the institution name or website address in the search bar and click **Search**.



The screenshot shows a user interface for connecting accounts. At the top, the user is identified as "Jim and Jane Sample". Navigation tabs include Home, Organizer, Workshop, Spending, Investments, Vault, and Reports. A top menu contains links for Education Center, Help, Join Screen Sharing Session, Settings, and Log out. The main content area features a search bar with the placeholder text "Enter your institution's name or website address". The search bar and the "Search" button are circled in red. Below the search bar, there is a message: "Need to add insurance policies or accounts you can't find online? You can add them manually:". Two buttons are provided: "Add Insurance Policies" (with an umbrella icon) and "Add Other Accounts" (with a dollar sign icon). A "Close" button is located at the bottom right of the search area. A vertical sidebar on the right contains icons for a dollar sign, home, user profile, another user profile, an arrow, a target, and a magnifying glass.

2 | Client Connections Booklet

Securities offered through LPL Financial, Member FINRA/SPIC. Investment advice offered through Flagship Harbor Advisors, a registered investment advisor. shepard FINANCIAL and Flagship Harbor Advisors are separate entities from LPL Financial.



Connecting Accounts

3. From the list of results, select the correct institution.

The screenshot shows the user interface for 'Jim and Jane Sample'. At the top, there is a navigation bar with links for 'Education Center', 'Help', 'Join Screen Sharing Session', 'Settings', and 'Log out'. Below this is a secondary navigation bar with buttons for 'Home', 'Organizer', 'Workshop', 'Spending', 'Investments', 'Vault', and 'Reports'. The main content area features a search box with the text 'Enter your institution's name or website address'. The search input contains 'emoney' and a 'Search' button. Below the search box, two results are listed: '1. eMoney Advisor Source (EMA) - Client Access' (highlighted with a red oval) and '2. GE Money - Loans'. On the right side of the search results, there are icons for a dollar sign and a house.


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Connecting Accounts

4. Enter your credentials and click **Connect**.

Connect to Institution ×


wealth.emaplan.com

View an important message about this institution.

To connect to your accounts, enter your credentials below.

User Name

Password

Connect

Please note:


The system will take a moment to verify and retrieve your information.

Accounts

+ Add

6 Cash 6 Credit Cards 12 Investments 13 Insurance 3 Loans 3 Others



Verifying your credentials... 

wealth.emaplan.com

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Connecting Accounts


5. The account values are pulled through onto the accounts page.





† Orion Investments	Taxable Investment	02/05/2015 10:44AM	\$40,249
† Permanent Life Insurance	Life Insurance - Variable Univers...	02/05/2015 10:44AM	\$14,500
Blue Credit Card	Loan - Credit Card	02/05/2015 10:44AM	-\$2,368
† Fidelity 401(k)	Qualified Retirement - Traditional...	02/05/2015 10:44AM	\$40,249
Stock Options	Stock Option	02/05/2015 10:44AM	\$1,239,505

6. To maintain the connection, see options in the upper right corner.

Accounts + Add

8 Cash 8 Credit Cards 15 Investments 19 Insurance 4 Loans 4 Others



 delete
 settings
 find new
 refresh

5 | Client Connections Booklet

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