

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

DATE	DESCRIPTION	AMOUNT
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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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 displays the 'Organizer' section of the Personal Financial Website. The interface is organized into several key areas:

- Navigation:** A top bar with 'Organizer' highlighted in a red box. Other menu items include Home, Workshop, Spending, Investments, Vault, Reports, Help, Settings, and Sign Out.
- Left Sidebar:** A list of sections for management: Accounts, Professional Contacts, Income, Expenses, and Savings, Future Goals, Financial Priorities, and Risk Tolerance.
- Profiles:** Two detailed profiles are shown:
 - Frank Miller:** Contact (867) 555-5555, email tedelstein@emoneyadvisor.com, DOB 6/1/1967, and occupation Owner at Buckingham Engineering.
 - Joanna Miller:** Contact (867) 333-3333, email jmiller@no-mail.com, DOB 3/20/1968, and occupation Nurse at Bryn Mawr Hospital.
- People Section:** A row of five circular icons representing other individuals: Peter (PM), Mary Beth (MM), Lucas (LM), Elaine (EG), and Stephanie (SM). An 'Add Person' button is located to the right.
- Property Section:** A row of four colored boxes representing assets: Cars (purple with diamond icon), Home (green with house icon), Jewelry (purple with diamond icon), and Vacation Mountain Home (green with house icon). An 'Add Property' button is located to the right.

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 fund

play video

Are your investments properly allocated? **new**

Are your personal finances balanced? **new**

Are you saving enough for retirement? **new**

Is your family protected? **new**

Are you saving enough for college? **new**

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Contact Marcus

Site Map
Home
Organizer
Workshop
Spending

Investments
Vault
Reports

Resources
Join Screen Sharing Session

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

RETIREMENT

0:00 / 1:33

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.

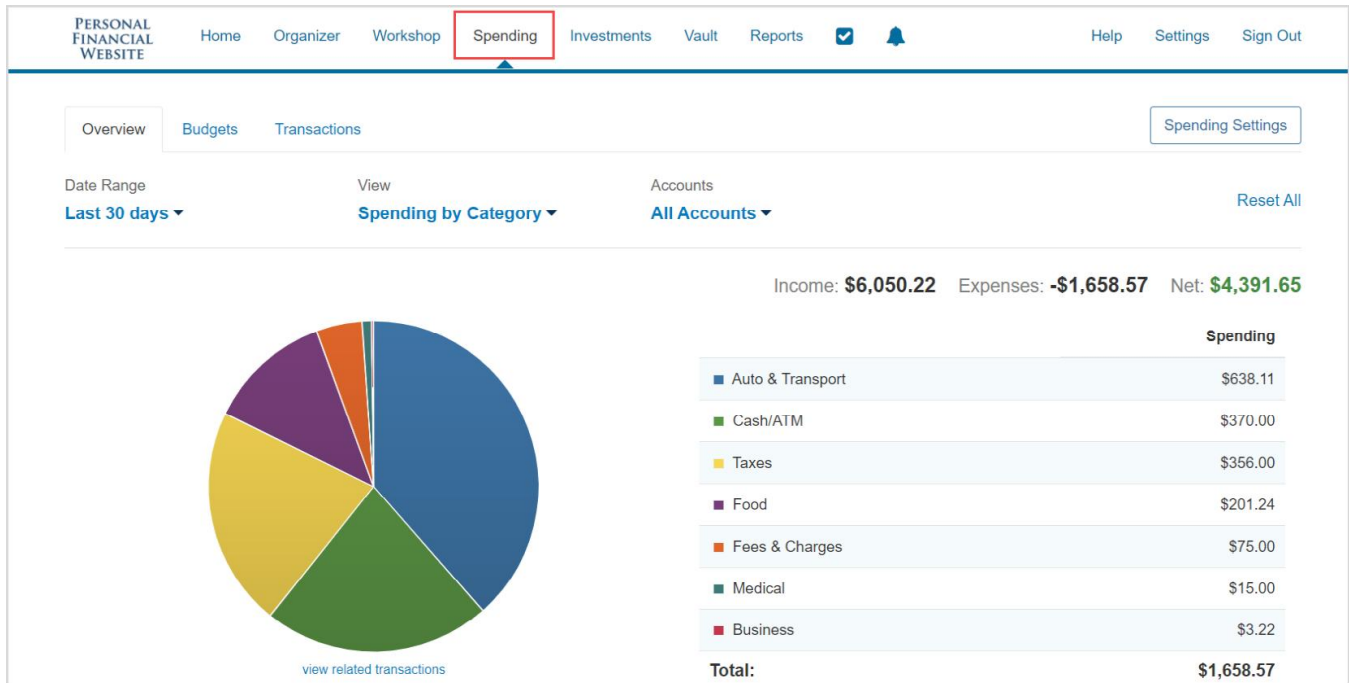
Before you begin
make sure these Organizer sections are complete:

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

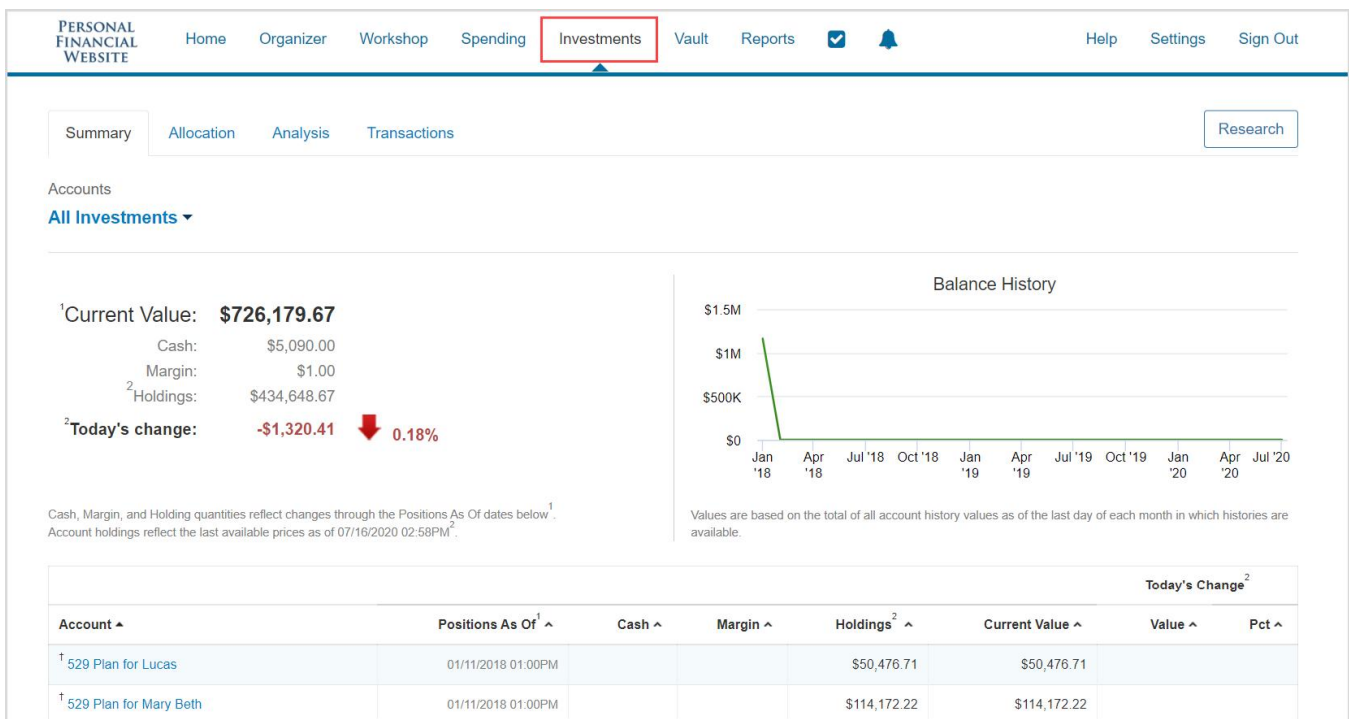
Begin

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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.



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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 Private Documents or Shared Documents folders, then click **Upload Files**. If you want your Advisor to see a document, upload into the Shared Documents folder. The My Private Documents folder contents are hidden from your Advisor.



Vault

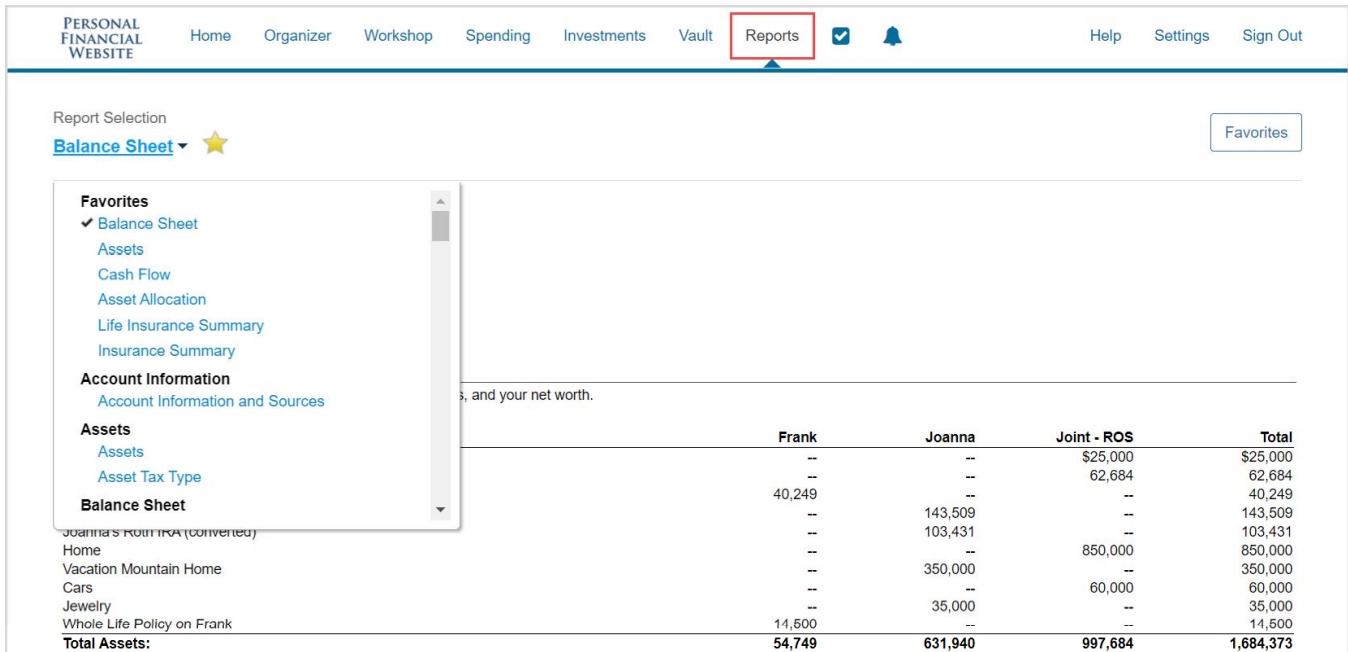
Files

search by name

Name	Size	Shared	Created
My Private Documents	0 Files		2/27/2017 at 1:47 pm
Shared Documents	10 Files		2/27/2017 at 1:47 pm

Usage: 400.34 KB (0 B are private)

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



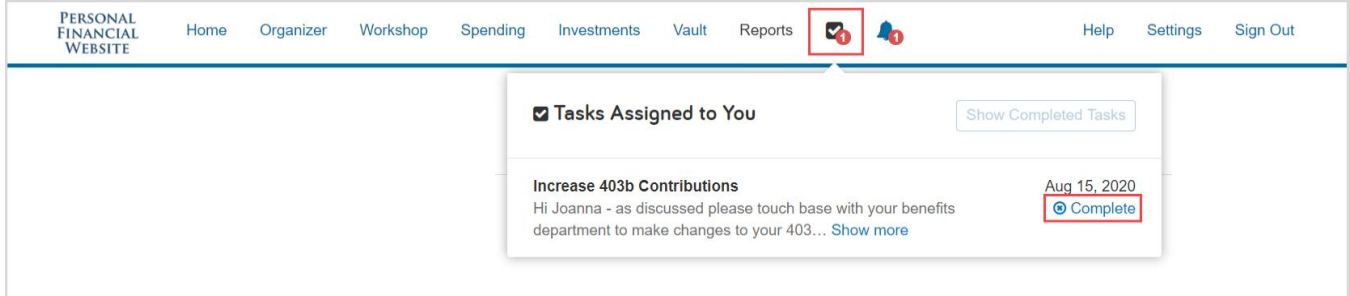
Report Selection

Balance Sheet

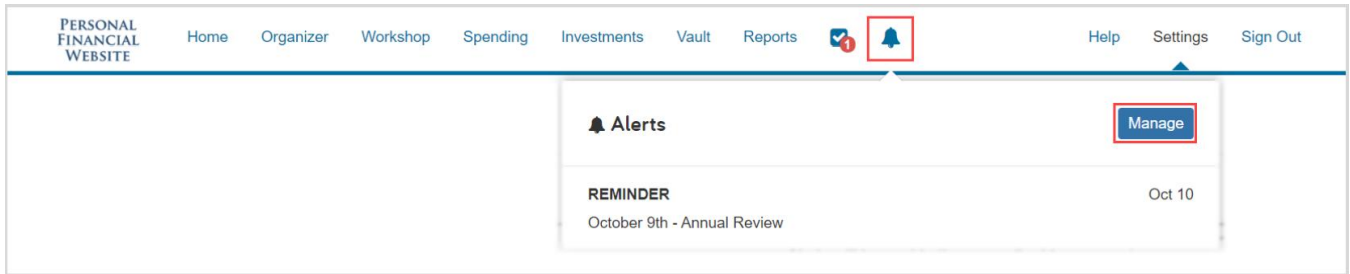
	Frank	Joanna	Joint - ROS	Total
Assets	--	--	\$25,000	\$25,000
Asset Tax Type	--	--	62,684	62,684
Balance Sheet	40,249	--	--	40,249
Joanna's Roth IRA (converted)	--	143,509	--	143,509
Home	--	103,431	--	103,431
Vacation Mountain Home	--	--	850,000	850,000
Cars	--	350,000	--	350,000
Jewelry	--	--	60,000	60,000
Whole Life Policy on Frank	--	35,000	--	35,000
Whole Life Policy on Frank	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.



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



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.

