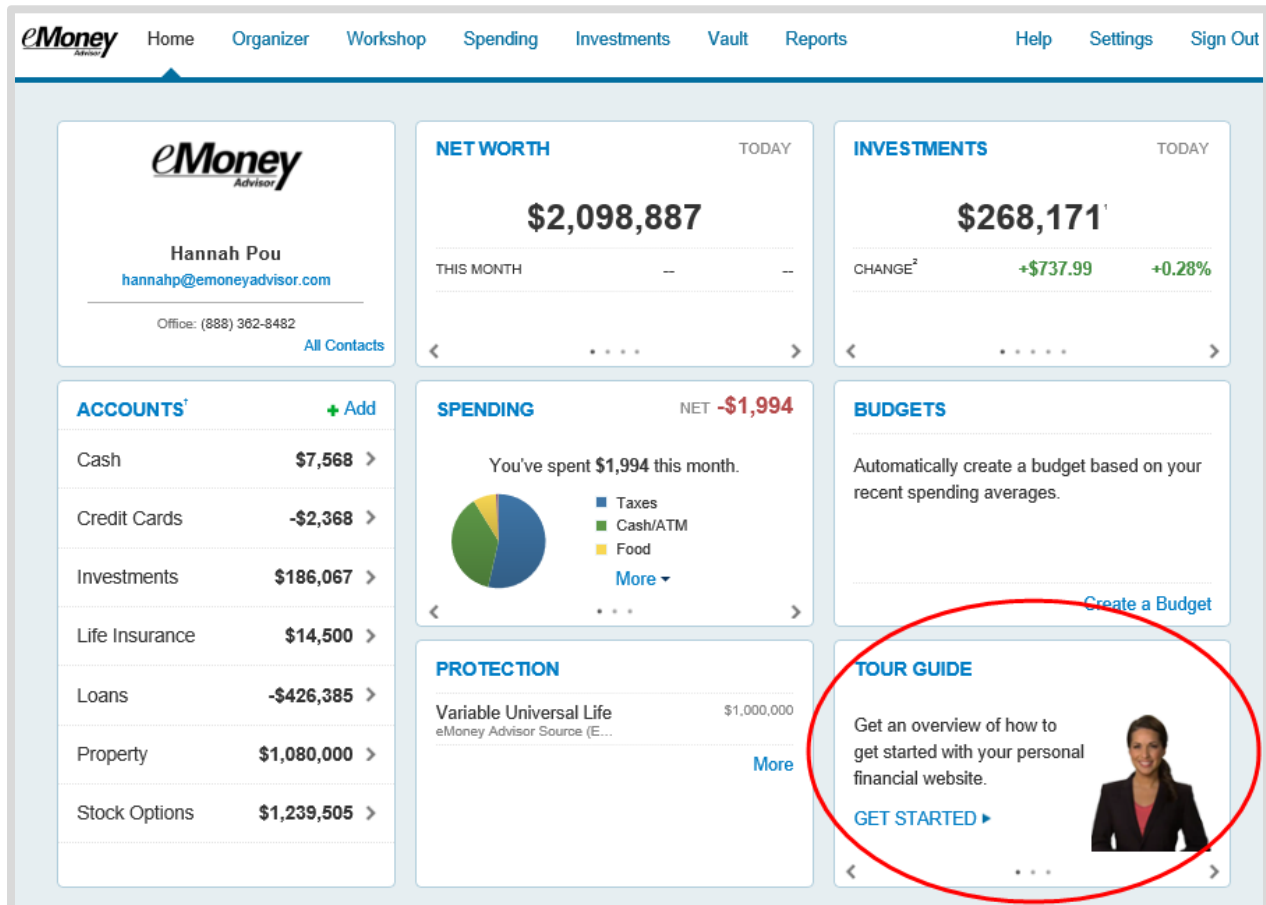


Personal Financial Website Overview

This overview will guide you through your new website! This Personal Financial Management 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.

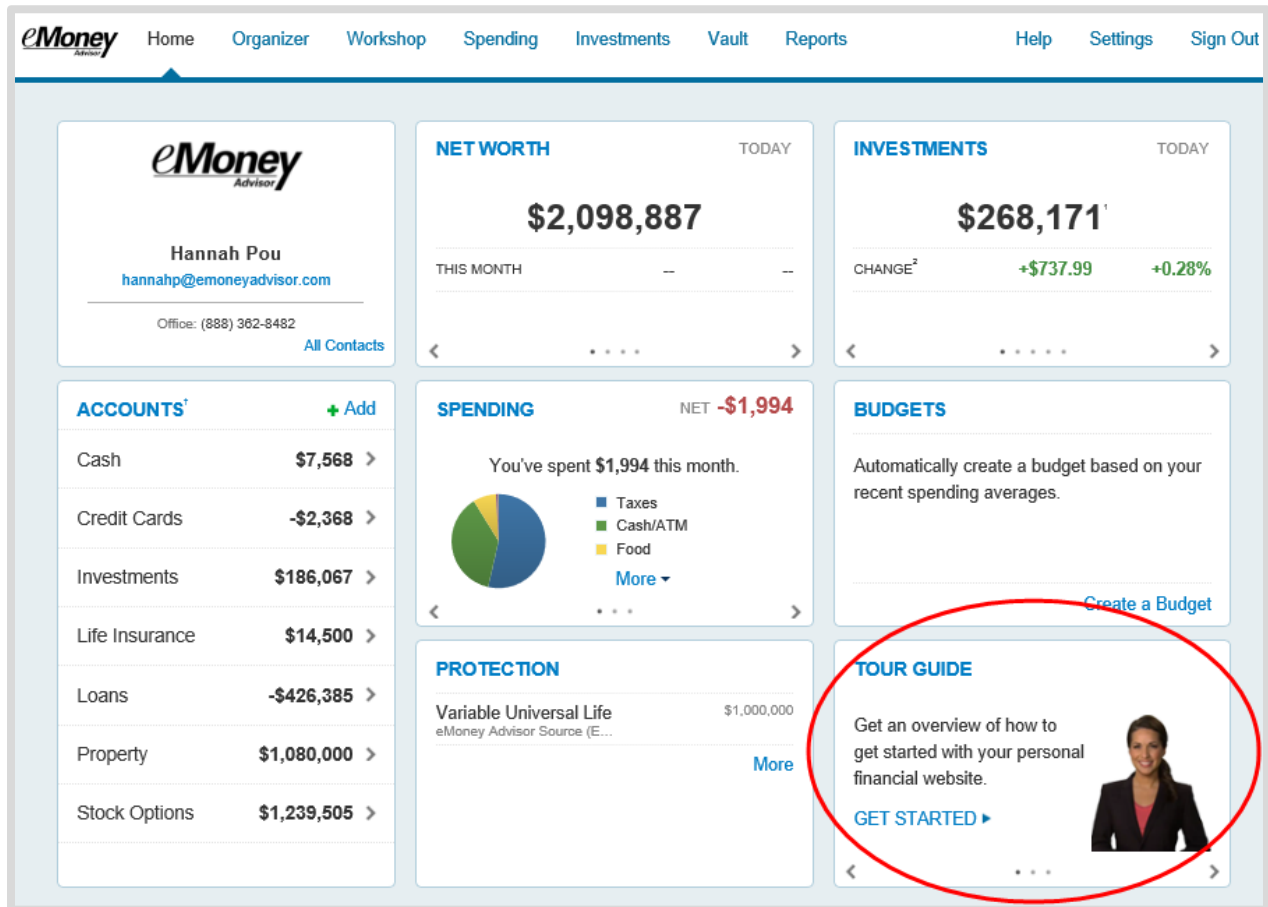
1. From your financial Home page, you will notice a tour guide in the bottom right tile. These brief videos will walk you through the different areas of this portal.



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.

Personal Financial Website 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.



eMoney Advisor Home Organizer Workshop Spending Investments Vault Reports Help Settings Sign Out

Hannah Pou
hannahp@emoneyadvisor.com
Office: (888) 362-8482 [All Contacts](#)

NET WORTH TODAY
\$2,098,887
THIS MONTH -- --

INVESTMENTS TODAY
\$268,171
CHANGE² **+\$737.99 +0.28%**

ACCOUNTS [+ Add](#)

| | | |
|----------------|-------------|---|
| Cash | \$7,568 | > |
| Credit Cards | -\$2,368 | > |
| Investments | \$186,067 | > |
| Life Insurance | \$14,500 | > |
| Loans | -\$426,385 | > |
| Property | \$1,080,000 | > |
| Stock Options | \$1,239,505 | > |

SPENDING NET **-\$1,994**
You've spent \$1,994 this month.

- Taxes
- Cash/ATM
- Food

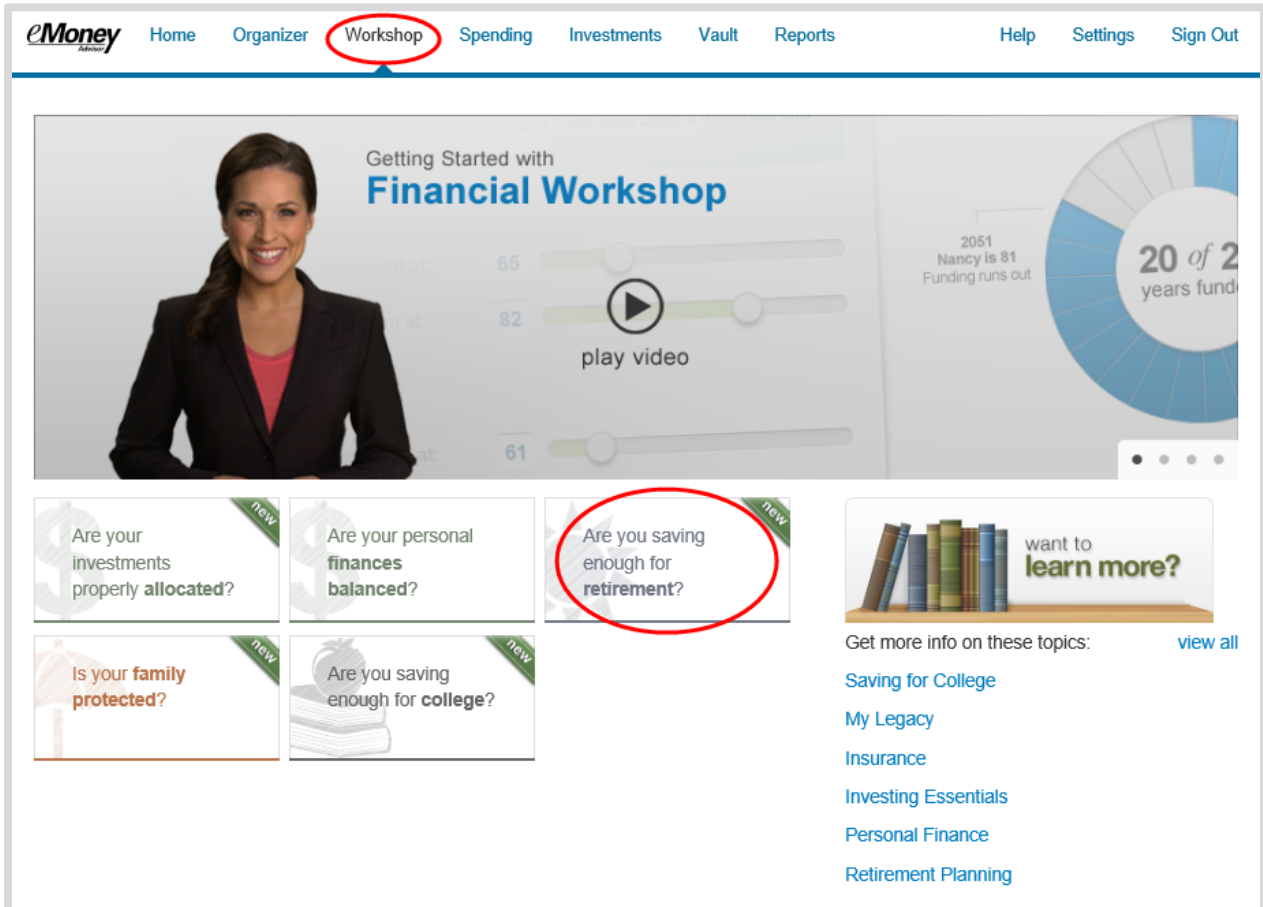
[More](#)

BUDGETS
Automatically create a budget based on your recent spending averages.
[Create a Budget](#)

PROTECTION
Variable Universal Life \$1,000,000
eMoney Advisor Source (E... [More](#)

TOUR GUIDE
Get an overview of how to get started with your personal financial website.
[GET STARTED](#)

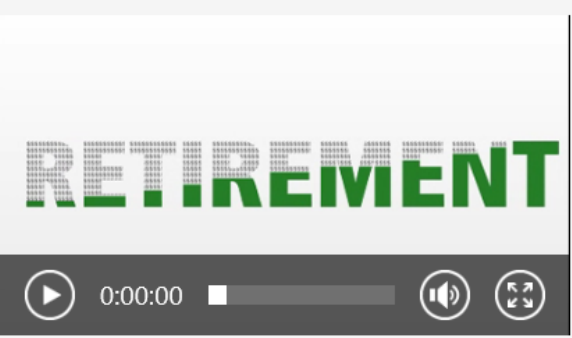
- The **workshops** page can help you take a closer look at your retirement strategy, insurance protection, and education goals. Select a workshop and before you begin, verify you've completed the appropriate organizer sections.



The screenshot shows the eMoney Advisor website interface. The navigation bar includes: Home, Organizer, **Workshop** (circled in red), Spending, Investments, Vault, Reports, Help, Settings, and Sign Out. The main content area features a "Getting Started with Financial Workshop" banner with a woman's image, a "play video" button, and a circular progress indicator showing "20 of 20 years funded". Below the banner are five interactive cards, each with a "new" tag: "Are your investments properly allocated?", "Are your personal finances balanced?", "Are you saving enough for retirement?" (circled in red), "Is your family protected?", and "Are you saving enough for college?". To the right, a "want to learn more?" section lists topics: Saving for College, My Legacy, Insurance, Investing Essentials, Personal Finance, and Retirement Planning, with a "view all" link.

Are you saving enough for retirement?

1 Intro 2 Your Strategy 3 Next Steps [back to workshop](#)



0:00:00

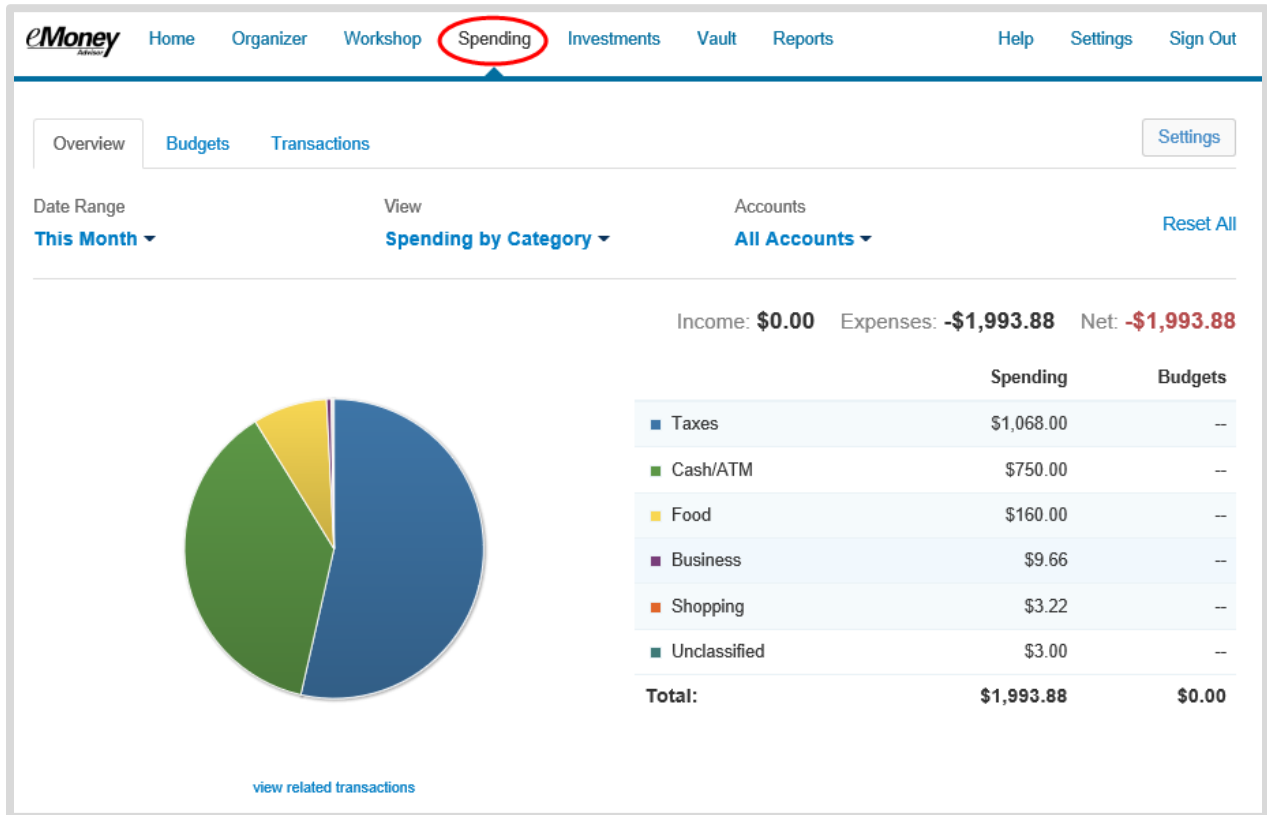
Take a look at your retirement strategy.
Find out how much your retirement will cost and see if you're on track to afford it.

Before you begin
make sure these Organizer sections are complete:

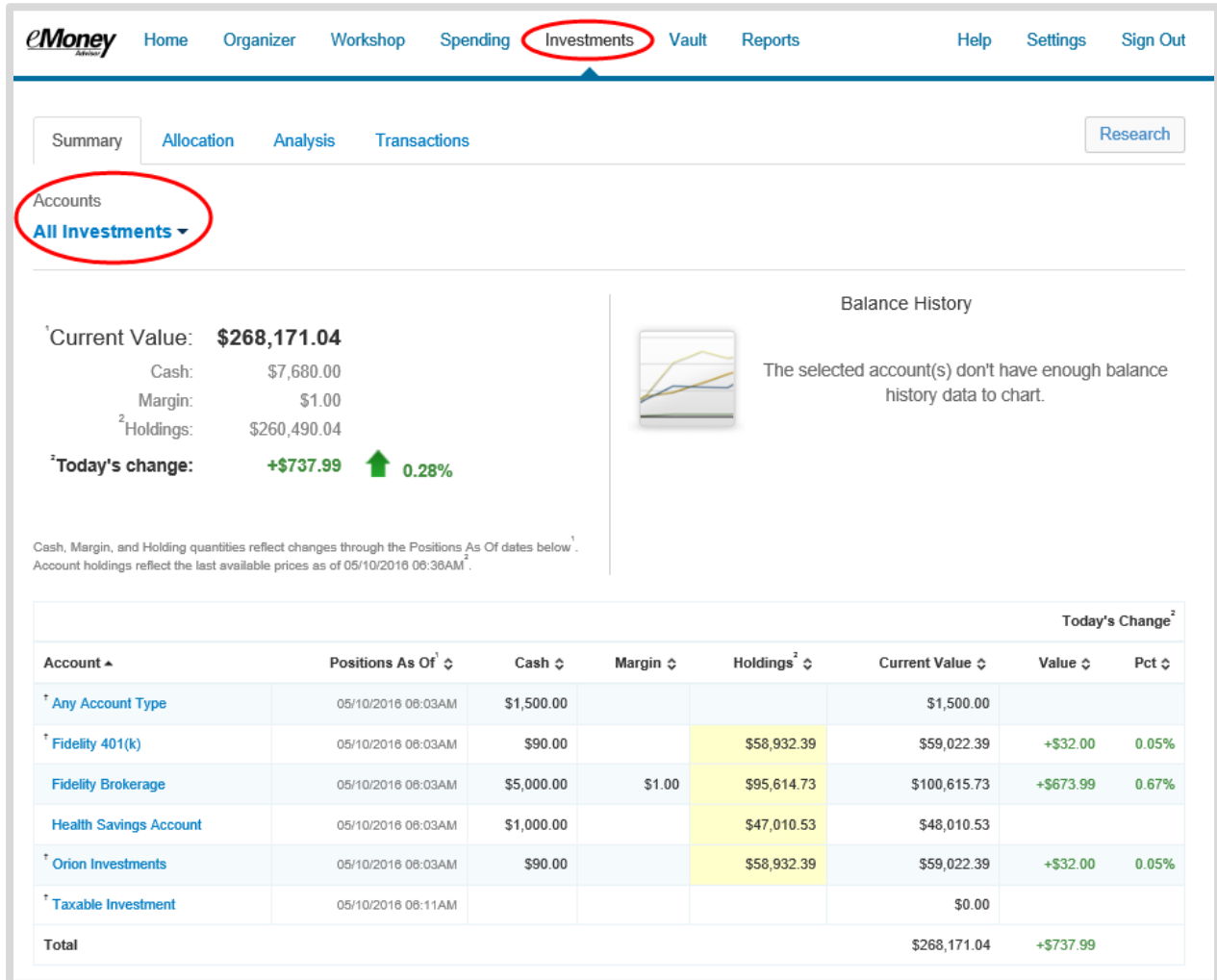
- [Accounts](#)
- [Family and Friends](#)
- [Income, Expenses, and Savings](#)

[Begin](#)

4. 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.



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.



Summary | Allocation | Analysis | Transactions | Research

Accounts
All Investments ▾

¹Current Value: **\$268,171.04**

Cash: \$7,680.00
Margin: \$1.00
²Holdings: \$260,490.04

²Today's change: **+\$737.99** ↑ **0.28%**

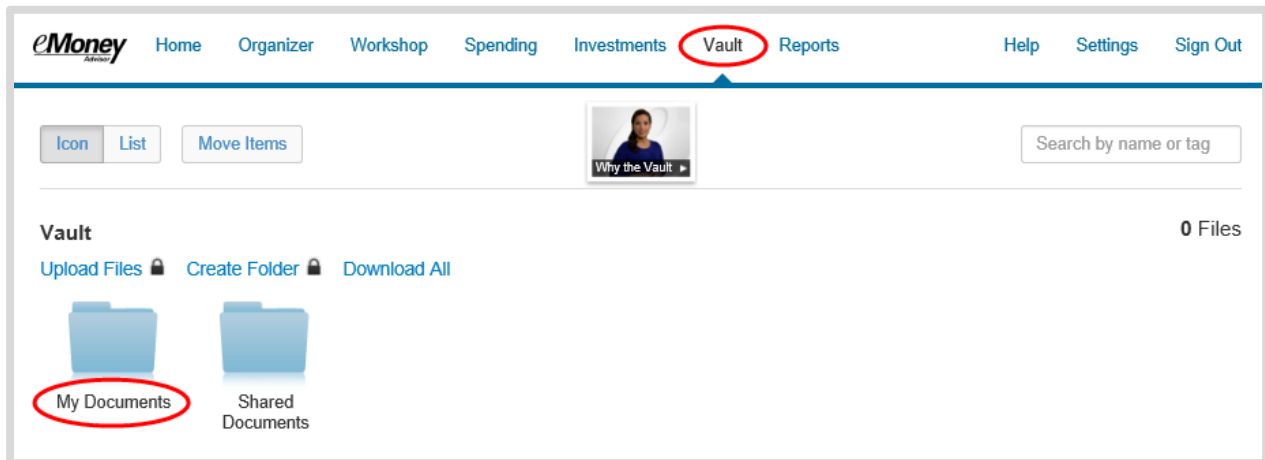
Balance History
The selected account(s) don't have enough balance history data to chart.

Cash, Margin, and Holding quantities reflect changes through the Positions As Of dates below ¹. Account holdings reflect the last available prices as of 05/10/2016 06:38AM ².

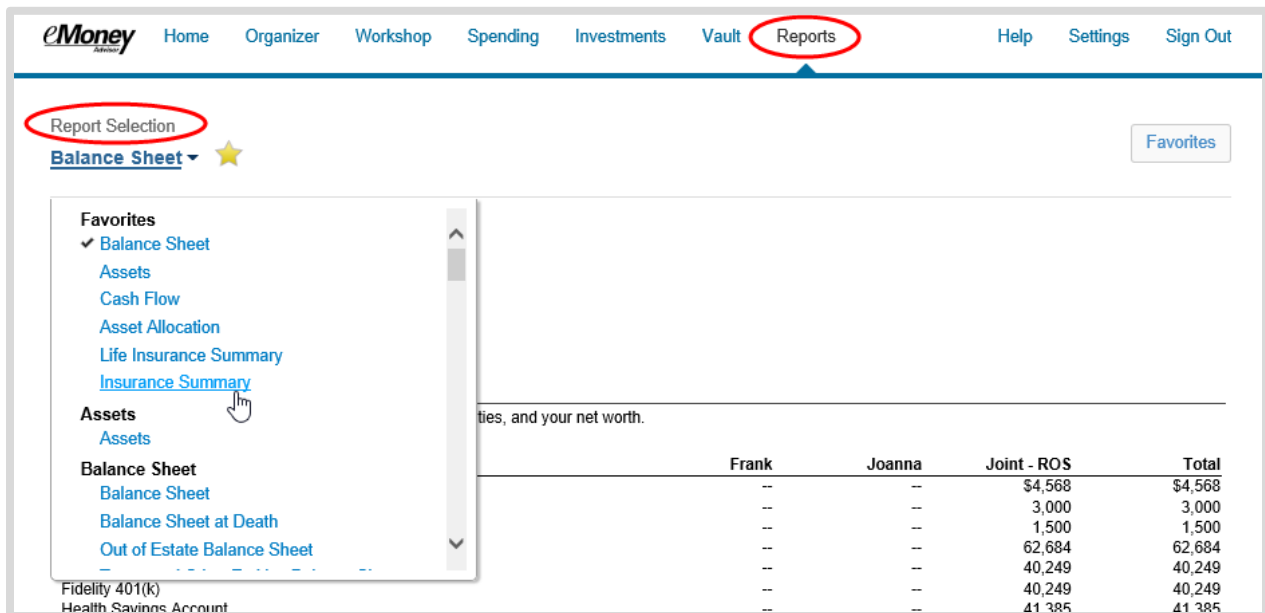
| Account ▲ | Positions As Of ¹ ⇅ | Cash ⇅ | Margin ⇅ | Holdings ² ⇅ | Current Value ⇅ | Value ⇅ | Pct ⇅ | Today's Change ² |
|------------------------|--------------------------------|------------|----------|-------------------------|-----------------|-----------|-------|-----------------------------|
| † 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 | | | |
| Total | | | | | \$268,171.04 | +\$737.99 | | |

Personal Financial Website Overview

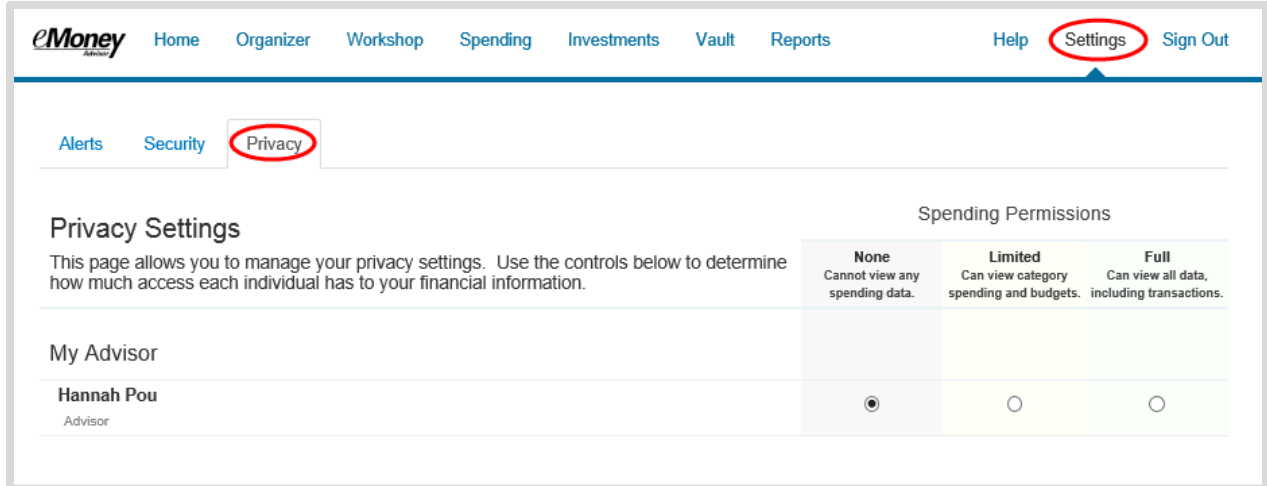
The **Vault** tab is a repository which files are stored by your advisor for your review, and where you can store files. To upload a file, click the **Upload Files** link. The **My Documents** folder is hidden from your advisor. If you want your advisor to see a document, upload into the **Shared Documents**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



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



6. 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.



eMoney Home Organizer Workshop Spending Investments Vault Reports Help **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.

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