



Schaefer Financial
MANAGEMENT

Connecting Your Accounts to Emoney

- 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
\$1,328,373
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

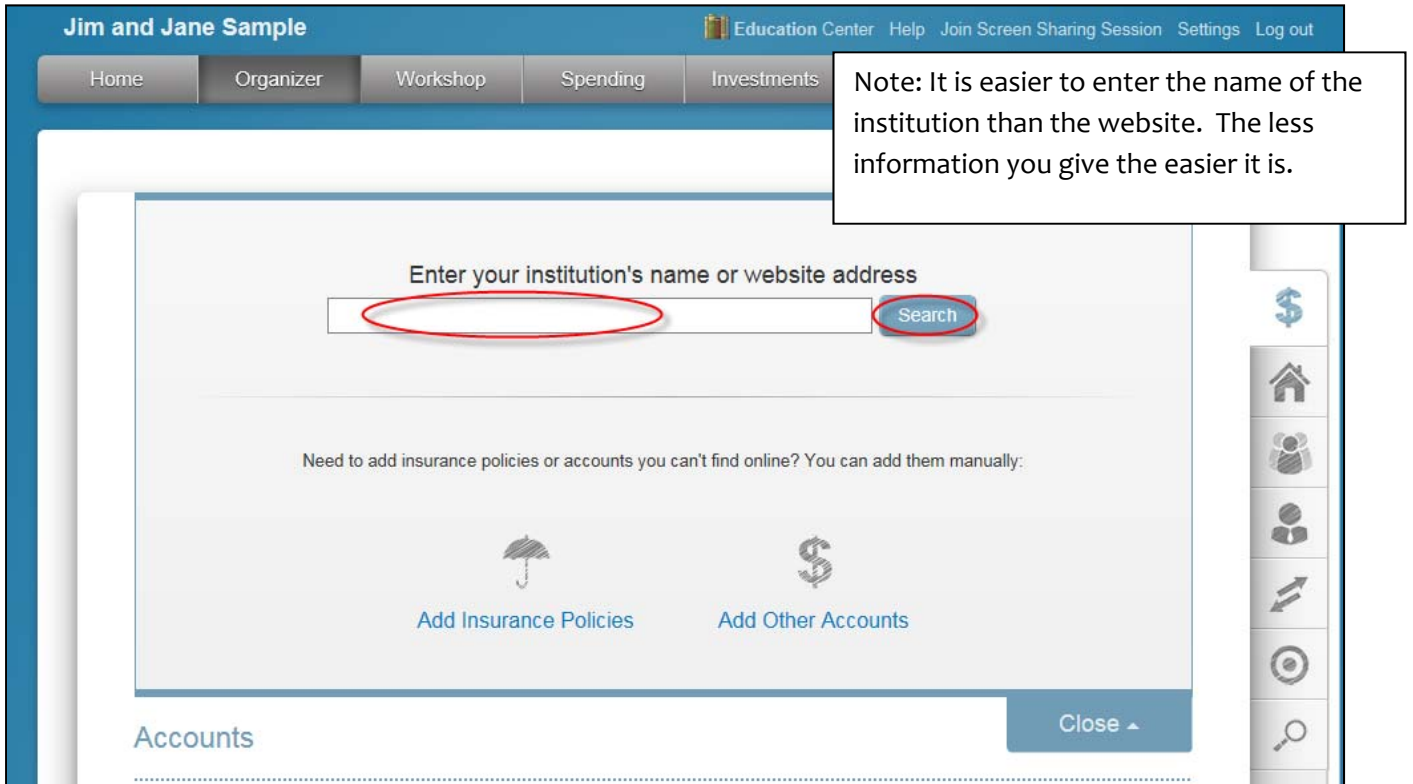
BUDGETS
Add bank accounts and credit cards to monitor transactions and analyze spending.
+ Add Accounts

PROTECTION

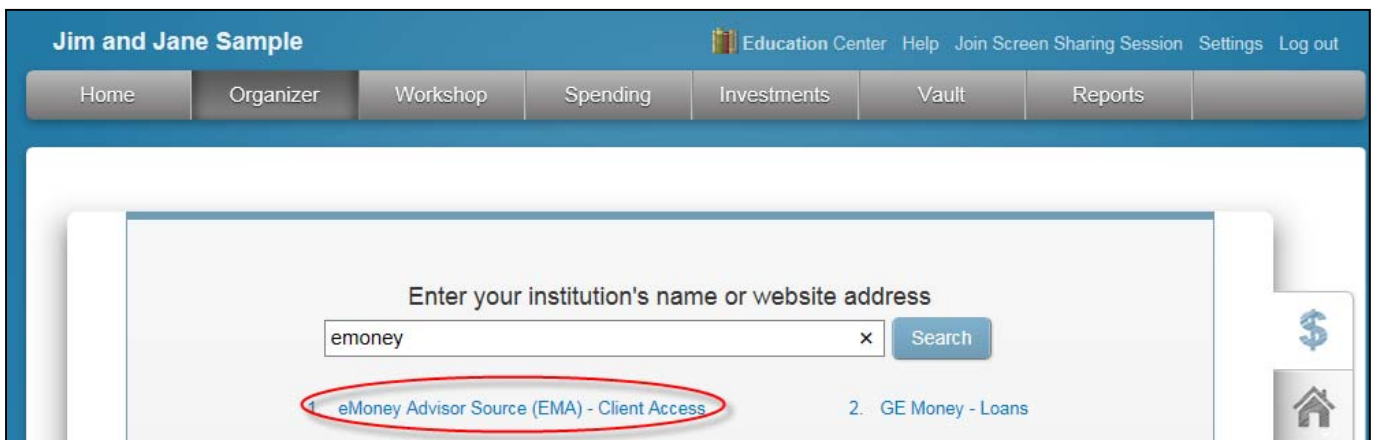
Variable Universal Life eMoney Advisor Source (E...	\$1,000,000
Variable Universal Life eMoney Advisor Source (E...	\$1,000,000
Auto eMoney Advisor Source (E...	

TOUR GUIDE
Get an overview of how to get started with your personal financial website.
GET STARTED ▶

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



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



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

Connect to Institution ✕

eMoney
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 few minutes to verify and retrieve your information.

Accounts + Add

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

eMoney

Verifying your credentials... ↻

wealth.emaplan.com

- The account values are pulled through onto the accounts page. (Do not worry about the different account types)

↑ 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

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

The screenshot shows the 'Accounts' page with a '+ Add' button in the top right. Below the header, there are statistics: 8 Cash, 8 Credit Cards, 15 Investments, 19 Insurance, 4 Loans, and 4 Others. At the bottom, there is an 'eMoney' logo and four icons: delete, settings, find new, and refresh. These icons are circled in red.

- To add another account click **+Add**

This screenshot is similar to the previous one, but the '+ Add' button in the top right corner is circled in red to indicate where to click to add a new account. The statistics below the header are: 1 Cash, 2 Credit Cards, 11 Investments, 3 Insurance, 2 Loans, and No Others.