Schaefer Financial
MANAGEMENT

Overview of Client Website

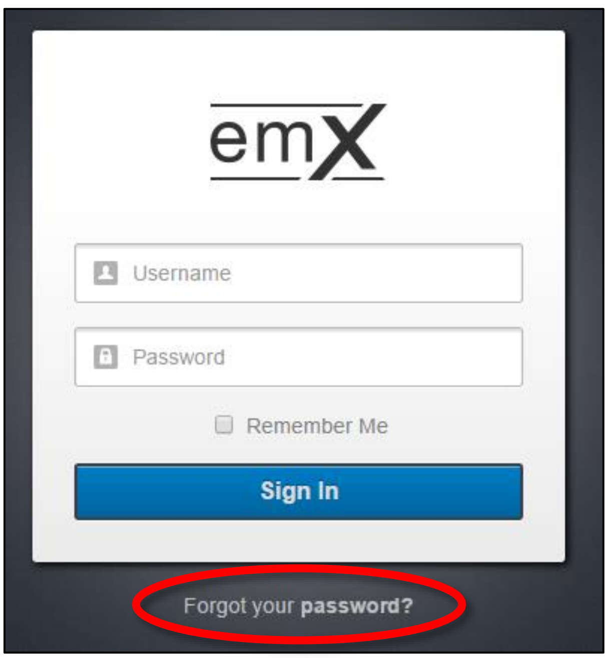
Go to schaeferfinancial.com; click on the “RESOURCES” tab; and then click the “eMoney” link under Client Logins. This will bring you to the log in page:

- Log in instructions – Will be in the email you received from **Notification** (subject will be **Website Access Notification**)

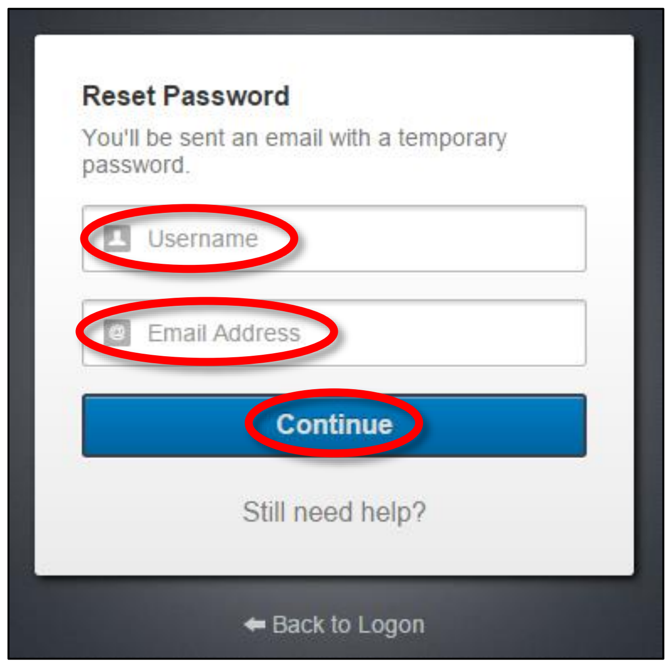
Note – The first time you log in you will need to set a new password and establish 3 security questions. You will also be prompted to accept terms and conditions. Each subsequent logon will prompt for an answer to 1 of the 3 selected security questions unless this box is checked:

If you forgot your password

- Click **forgot your password?**



- Type in your **username** (should be in your original Emoney email) and your **email address** and click **Continue**



You will be asked to answer one of your security questions and then you will receive an email with a temporary password

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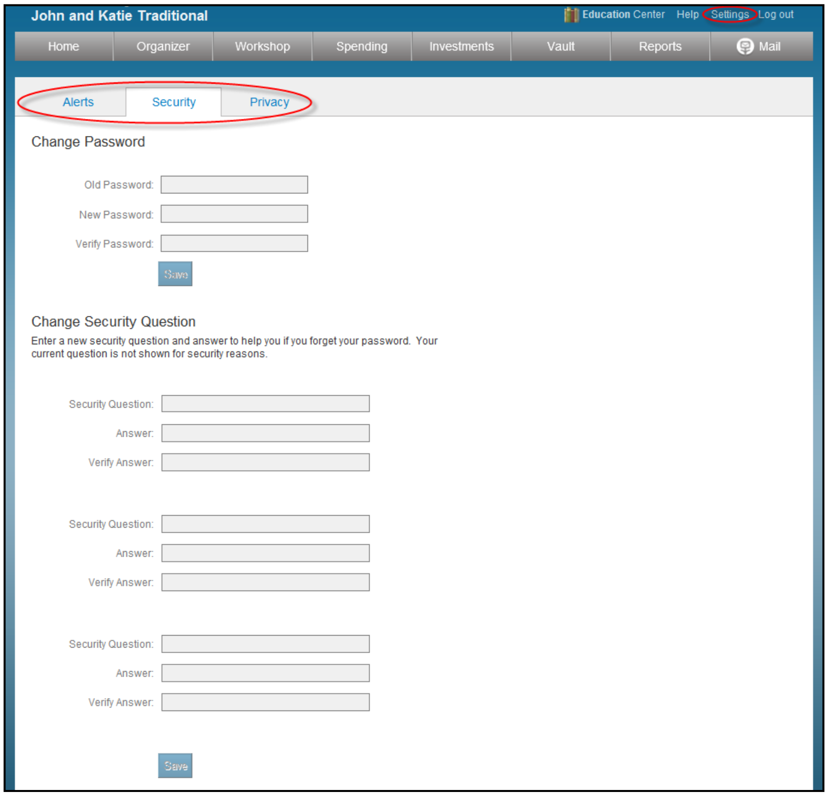
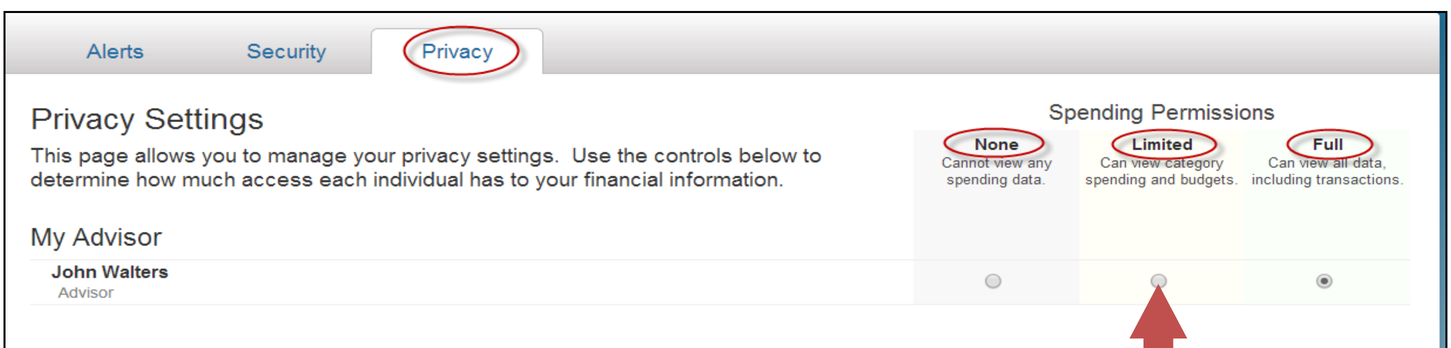
Centennial, CO 80112
Phone 303-770-6700 | Fax 303-770-1041
schaeferfinancial.com

Click **Settings** to set alerts, security & privacy settings.



The **Privacy** tab allows you to control what Schaefer Financial Management (SFM) can see.



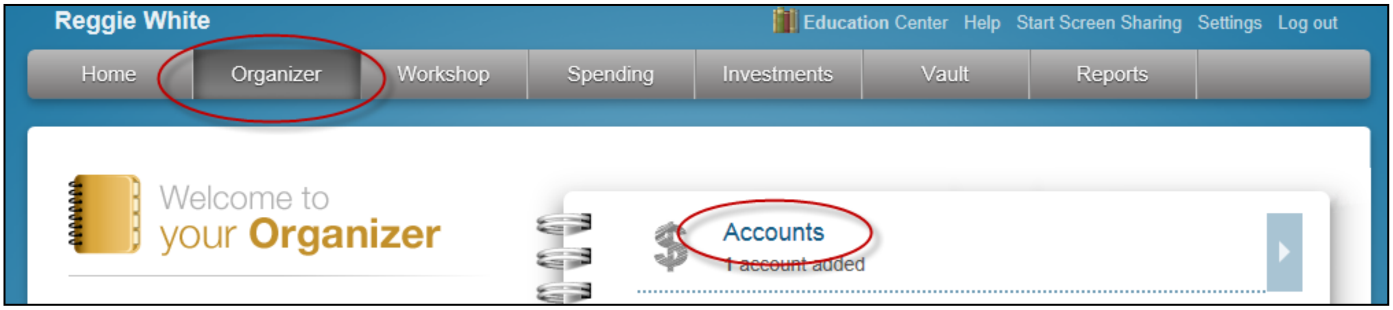
We recommend giving SFM **Limited** access

- **None -** SFM will not have access to any spending data.
- **Limited** - SFM will have limited access to spending details and can view only the categories regarding the spending and budget, NOT individual transactions.
- **Full access** - SFM can view spending and budgeting items, INCLUDING transactions.

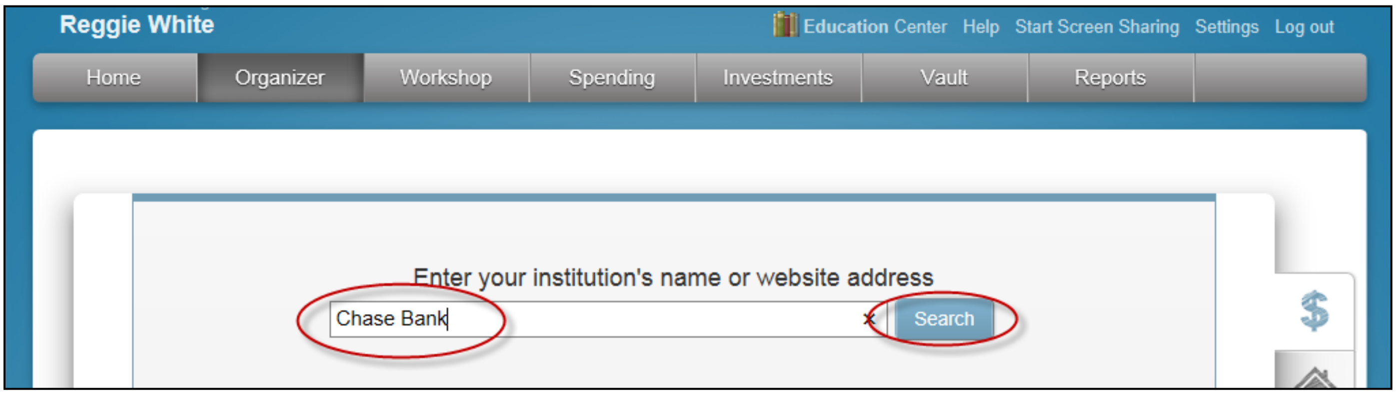
Add Your Information (Organizer Tab)

The **Organizer** is a place to enter your data. From here you can; link your different accounts, add your real estate property, family members, salary, yearly expenses, etc.

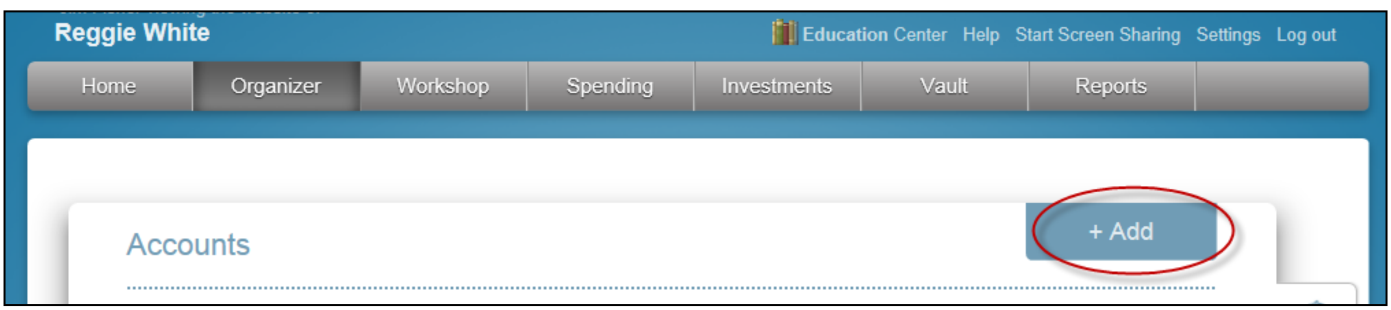
- To add accounts to the **Organizer**, click **Accounts.**



- Click the **Add** button to search for a specific institution.



- Type in the name of the institution where you have accounts and click **Search.**



Note – There must be an online account set up at the institution in order to connect it and bring the current value into the **Organizer**.

Track Your Spending (Spending Tab)

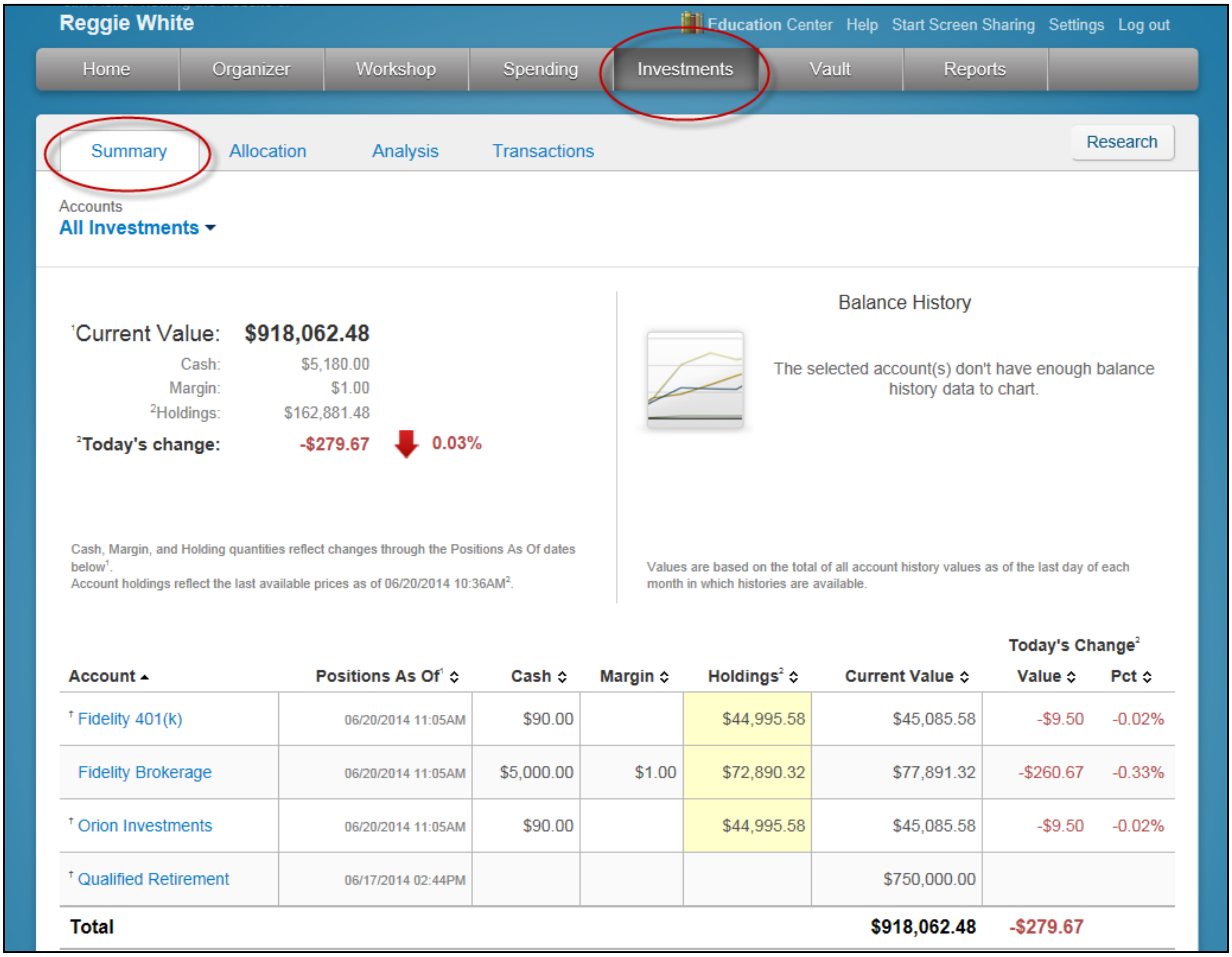
The **Spending** tab allows you to track your spending habits and build a custom budget. SFM will only be able to see what you designated in the settings.

- The **Overview** tab provides a pie chart based off of recent transactions imported from aggregated accounts.
- The **Budget** window is a snapshot that allows you to monitor if you are on track with your monthly budget.
- The **Transaction** tab is where to view transactions pulled in from connected accounts.

Note: Transactions may be placed in the wrong categories. Also debit card use will come up as Cash/ATM.

Overview of your Financial Assets (Investments Tab)

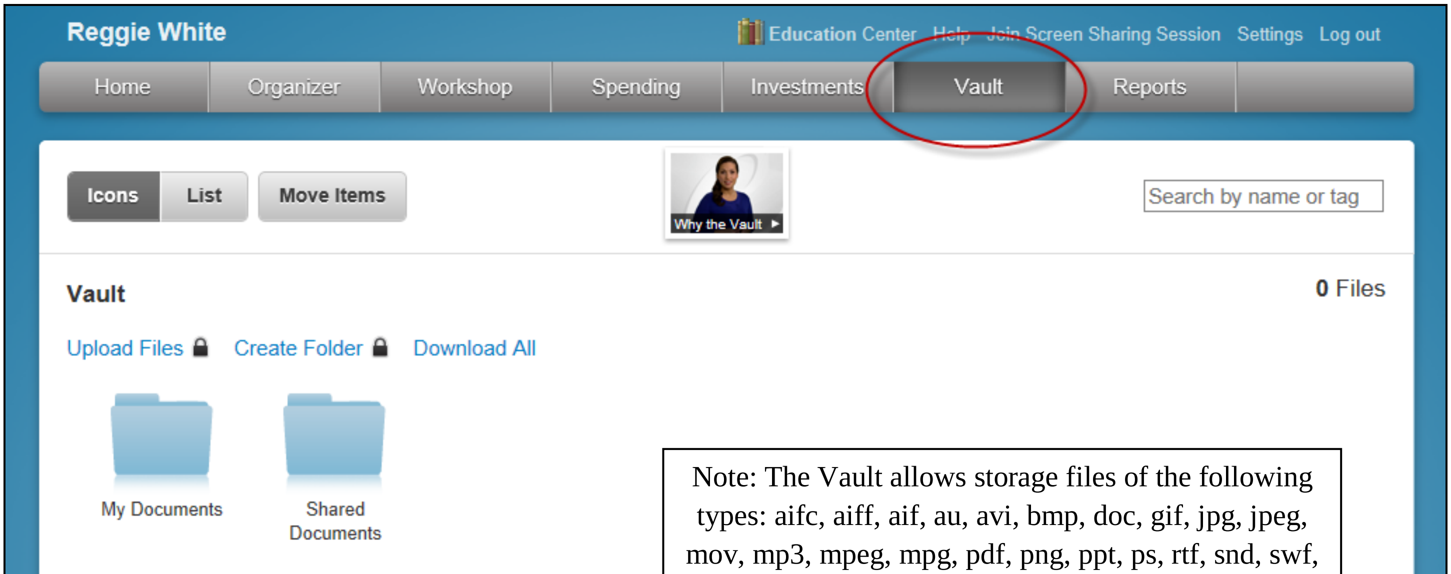
The **Investments** tab allows you to view up to date market information based off of any connected investments.



Click on the **Account Name** to see a holdings break down of a given account.

Sharing and Storing Documents (Vault)

The **Vault** provides secure storage for valuable personal documents (**wills, trusts, insurance documents, passports, etc.**) in electronic format.



Note: The Vault allows storage files of the following types: aifc, aiff, aif, au, avi, bmp, doc, gif, jpg, jpeg, mov, mp3, mpeg, mpg, pdf, png, ppt, ps, rtf, snd, swf, tax, tif, tiff, txt, wav, wma, wmv, wps, xls, and xml.

- You can upload documents into the **Shared Documents** folder, allowing the Advisor to also view the contents.
- You can upload documents into the **My Documents** folder, which is a private folder where only you can access the contents.