

A Guide to Getting Started

This User Guide details how to get started with your Personal Financial Website.

Your Personal Financial Website helps you see your financial life beyond the numbers. With our automated fact-finding questionnaire, you can get started with your Personal Financial Website on your own in just a few easy steps.

Register For Your Financial Website

Click the link sent to your inbox to get started. Then, create your own secure username and password.

Choose a username and password to access your website.

Need help?

Password requirements:

- Contains at least 8 characters.
- Contains lowercase letters.
- Contains uppercase letters.
- Contains numbers.
- Contains special characters.
- Does not contain username, first name, or last name.

Complete the Series of Introductory Questions

Answer a few basic questions to help us understand your current finances and future goals.

What's on your mind? [Go to my homepage](#)

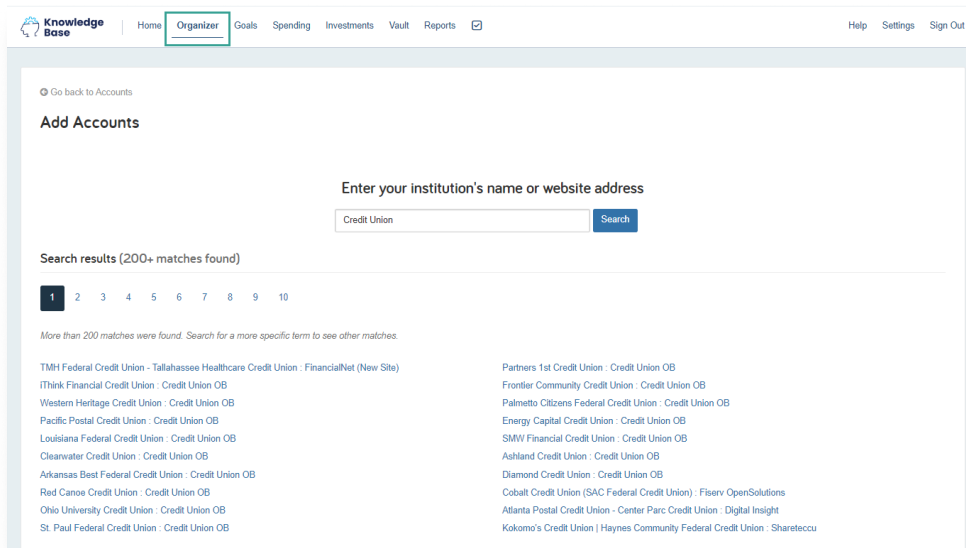
Our experienced team of professionals can help in all facets of planning for your financial future.

Select all that apply:

<input type="radio"/> Retirement Planning	<input type="radio"/> Providing a Legacy
<input type="radio"/> Caring for Parents	<input type="radio"/> Contributing to Charity
<input type="radio"/> Saving for College	<input checked="" type="radio"/> Saving for Major Purchases
<input type="radio"/> Managing a Budget	<input checked="" type="radio"/> Investment Management
<input checked="" type="radio"/> Minimizing Taxes	<input type="radio"/> Click here to add your own

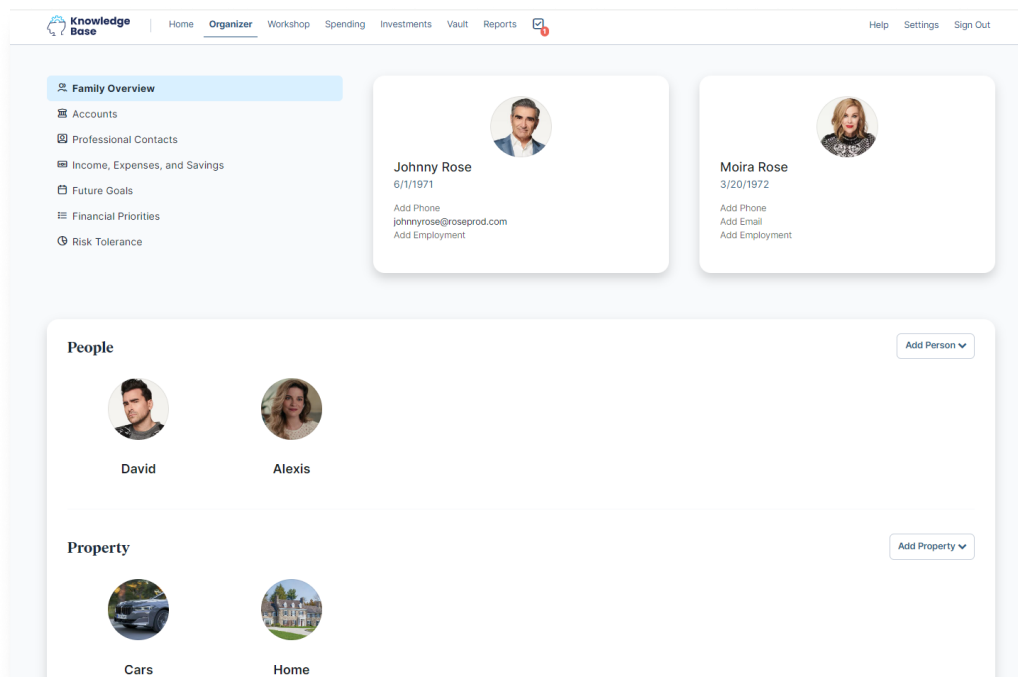
Connect Your Financial Accounts

From your Home page, click on **Organizer**, then **Accounts** to start adding your financial institutions, like bank and credit accounts.



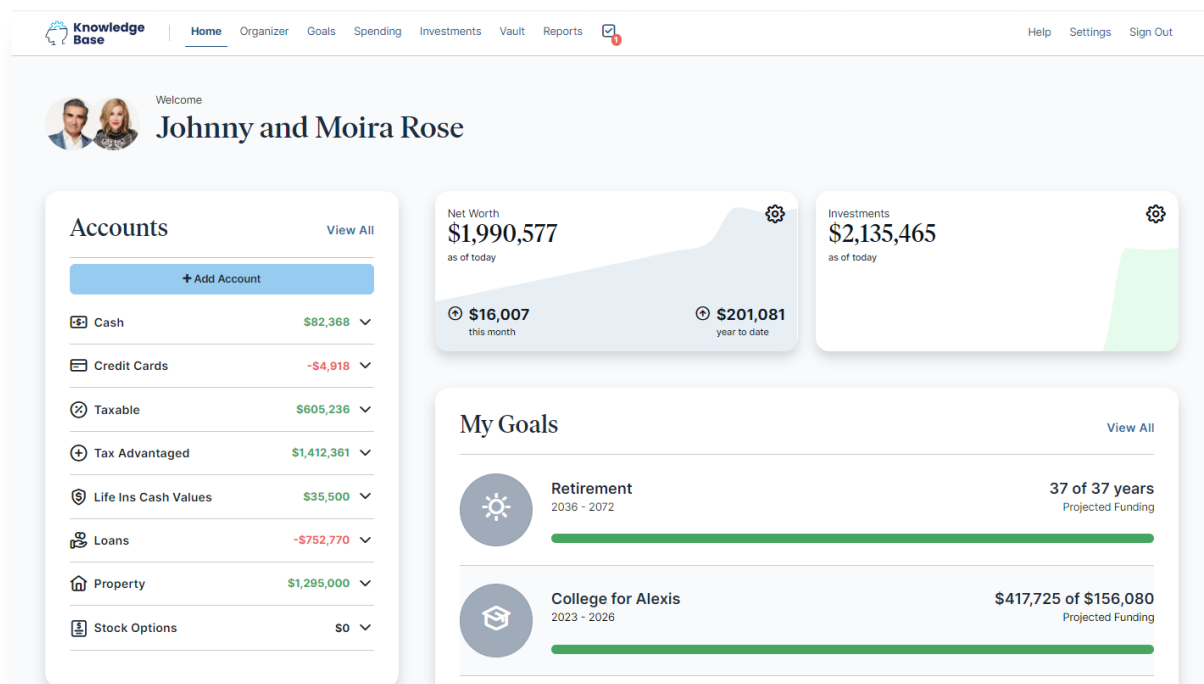
Personalize Your Website

Customize your website by adding photos of what your wealth represents --- the people and things most important in your life.



See Your Finances Come to Life

Easily organize and track your financial goals with spending and budgeting tools, investment monitoring, and more.



Now you're ready to start managing your wealth with your personal financial website!