Link Manually Entered Accounts Personal Financial Website

This guide demonstrates how to connect your manually entered facts. You will go through this process on an account basis. There are many benefits to connecting your accounts, the most important being able to have up-to-date access to account balances and information. To begin, log in to your Personal Financial Website.

1. On your Home page, locate the Accounts tile on the left. Click on any section to expand. Any manually entered facts will have a **Link Account** button.

Knowledge Home Organi Welcome Frank and Joann	izer Goals Spending I	nvestments Vault Reports My Ad	visor 🔒		Help Settings Sign Ou
Accounts + Add Account	View All	Net Worth \$2,061,768 as of today	٢	Investments \$1,824,456 as of today	Ø
④ Cash Cash / Emergency Fund	\$79,568	• \$4,821 this month	* \$102,336 year to date		
Link Account	6 years ago	My Goals	View All		
Card eMoney Advisor Source (EMA) - Client Accu	-\$1,275 ess 2 months ago	today.	nt		How am I doing today?

2. After clicking Link Account, you will be prompted to search for and identify the appropriate financial institution related to that specific account. Search for **Name** or **Website Address**.

Go back to Home Link Account			
	Select Your Account		
Existing Account Data Account Name Card Balance (as of 091304 at 12:20 PM) (\$1.275) Type Credit Card	Enter Your Institution's Name or Website Address eMoney Advisor Source (EMA) - Client Access		
	We have pre-filled the search form with an institution based on your manual account data. If this institution is incorrect, or does not return any results, you may alter or replace it as needed		
	Search Results (1 result found)	Sort By: Popular 🕶	
	eMoney Advisor Source (EMA) - Client Access	emaplan.com	

If you previously entered an Institution Name within your Organizer for an account, the application will pre-populate search results based on what you entered.

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- 3. After selecting the right institution, you will enter your credentials to establish the connection. The institution may prompt for additional verification, such as security questions or 2-Factor Authentication.
- 4. Once the link is established, you will see a list of accounts that you can link to your site. Click the account that matches and then click Continue.

© Go back to Home Link Account						
		Tind Institution Select	2 3 :Your Account Link Account			
Existing Account Data	Select	Account				
Account Name Card Balance (as of 08/13/24 at 12:20 PM) (\$1,275) Tone	You've successfully linked eMoney Advisor Source (EMA) - Client Access. Please select the account below that best matches your existing account to continue.					
Credit Card		Account	Туре	Balance		
	0	******Card	Credit Card	-\$1,275 Jun 13, 2024 12:24 PM		
Selected Institution	0	Easy 123 Checking	Checking	\$54,568 Jun 13, 2024 12:24 PM		
eMoney Advisor Source (EMA) - Client Access wealth.emaplan.com	0	Orion Investments (**9174)	Taxable Investment	\$320,249 Jun 13, 2024 12:24 PM		
Have another online login to eMoney Advisor Source (EMA) - Client Access? Add another eMoney Advisor Source (EMA) - Client Access login now.						
	Previous	5		Cont		

5. You will then be asked to Confirm your account selection by clicking Link Account.

Go back to Home					
	Find I	1 2 nstitution Select Your Account	3 Link Account		
Existing Account Data	Confirm Acco	punt			
Account Name Card Balance (as of 08/13/24 at 12:20 PM) (\$1,275)	Please confirm your account selection. Remember that the existing account data may be out of date or formatted differently from the updated account data more recently imported from your institution.				
Type Credit Card		Existing Account	Online Account		
	Account	*****************Card	************Card		
Selected Institution	Туре	Credit Card	Credit Card		
	Balance	(\$1,275) 06/13/24 at 12:20 PM	-\$1,275 Jun 13, 2024 12:24 PM		
(EMA) - Client Access wealth.emaplan.com	Previous		Link Account		

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6. You'll receive a confirmation when the account is linked.

G Go b Link	ack to Home Account				
		1 Find Institution	2 Select Your Account	3 Link Account	
	• Your account is now linked. All of your accounts are now Online. Click "Done" to	return to the Home Page.			
Done]				Continue