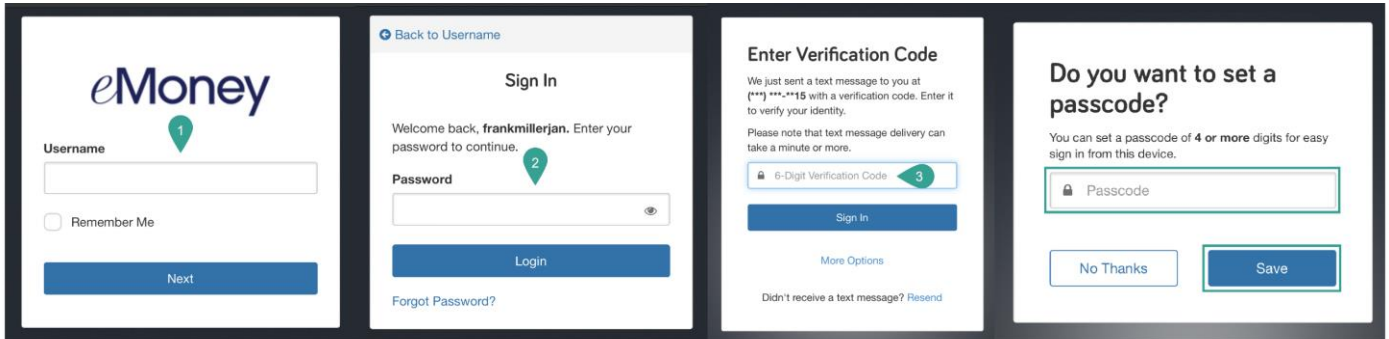


# Mobile Website Overview

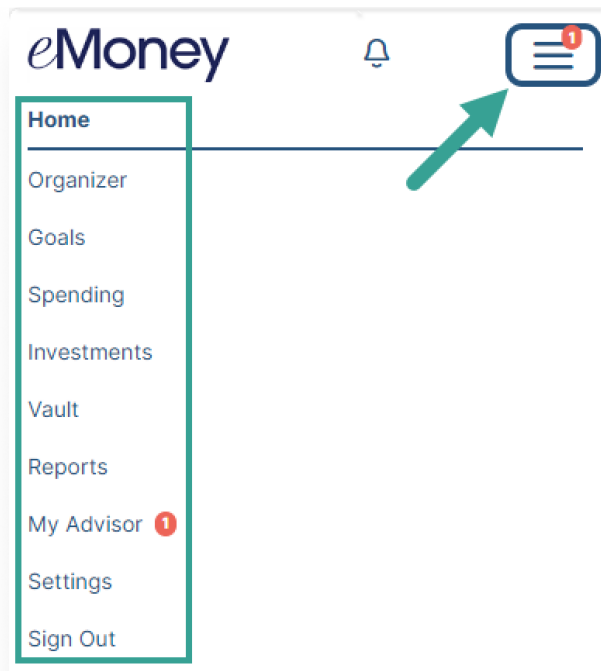
This training guide demonstrates the functionality of the Mobile version of your Personal Financial Website.

The Mobile Website includes the same features as the desktop version, including a consolidated view of your information. To access your website, use your standard login URL. You can refer to the confirmation email sent to you when you first registered your access.

From the login screen, follow the steps to enter your **Username, Password, and Verification Code**. You may be prompted to enter a passcode if you previously set one up in Security Settings (outlined later in this guide). If you have not set a passcode, you can set one up the first time you access the mobile site.

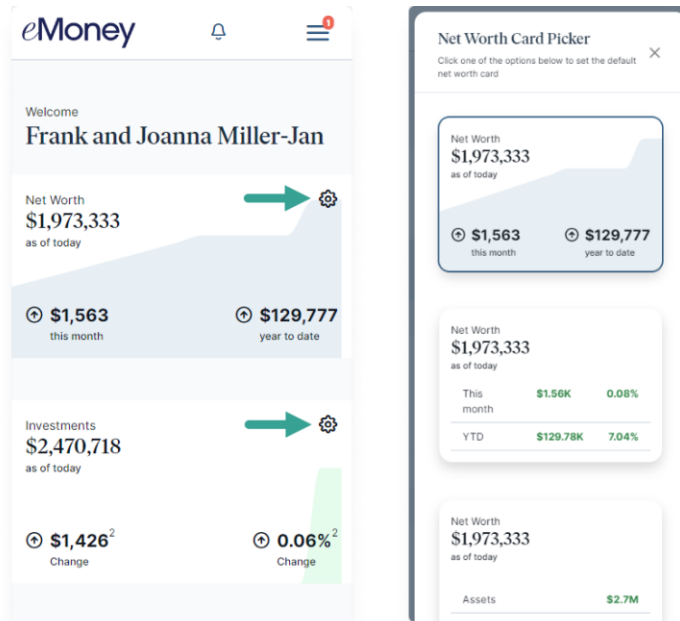


1. Once successfully authenticated, you will be taken to your Home page, which consolidates all the data we have entered on your website. Click the **3-line hamburger** menu button to access the main navigation.

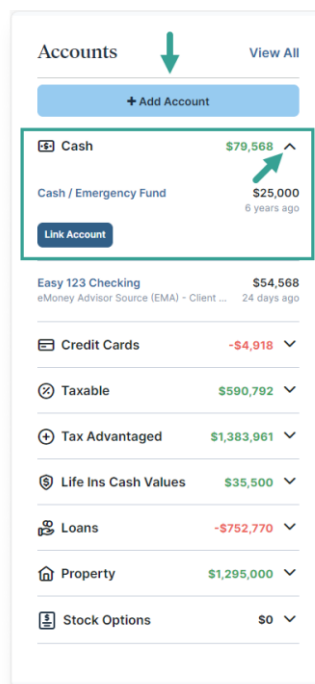


## Home

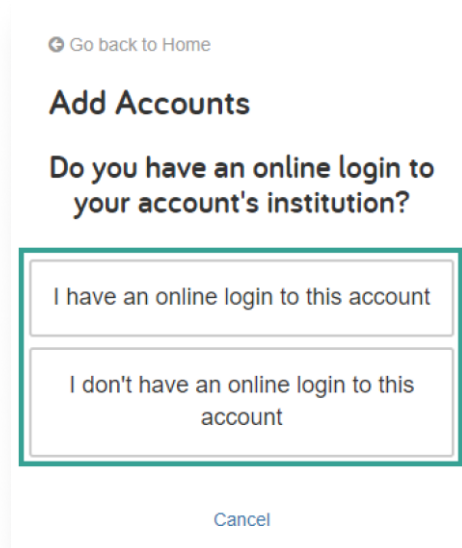
1. Beginning with the **Net Worth** and **Investments** cards, your website will allow you to customize your experience. Click the **gear** icon on each card to pick your preferred view.



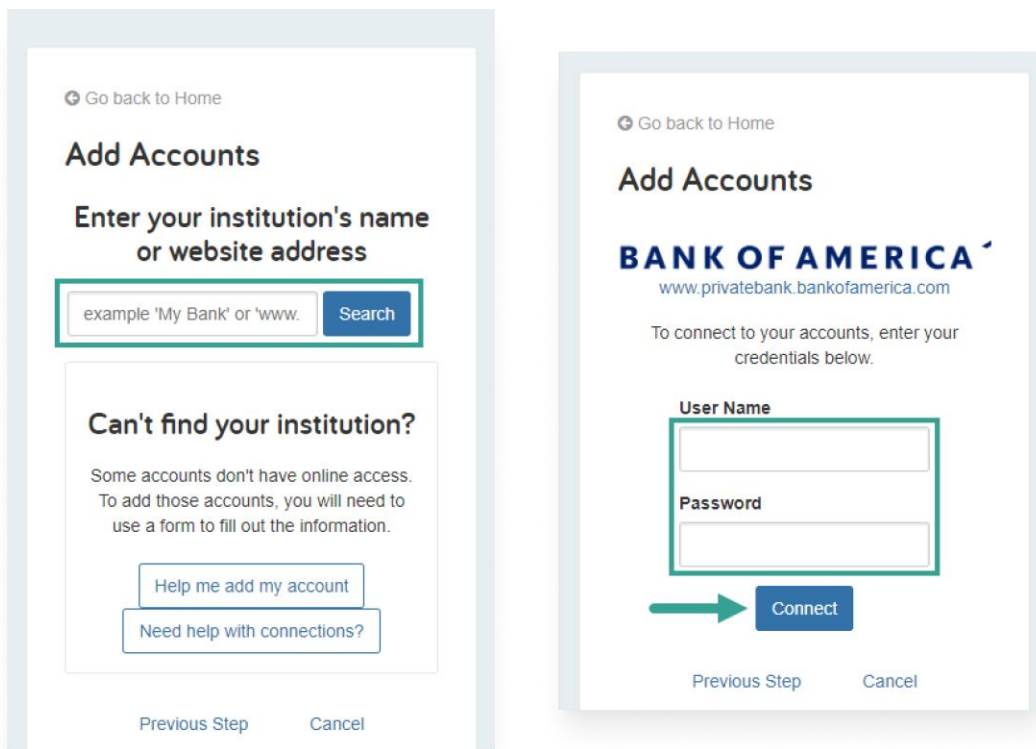
2. Scrolling down the Home page, you will see your Accounts organized into categories. Click the arrow on a category to expand or close the view of accounts within that category. If you notice any accounts missing, click **+ Add Account** to connect to your financial institution.



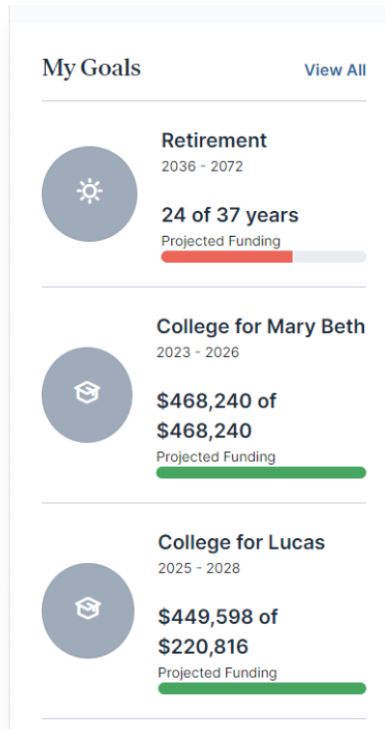
3. You will be asked if you have an online login to the account. Selecting I don't have an online login, will prompt you to add your account manually. For this example, we will choose the first option – **I have an online login to this account**.



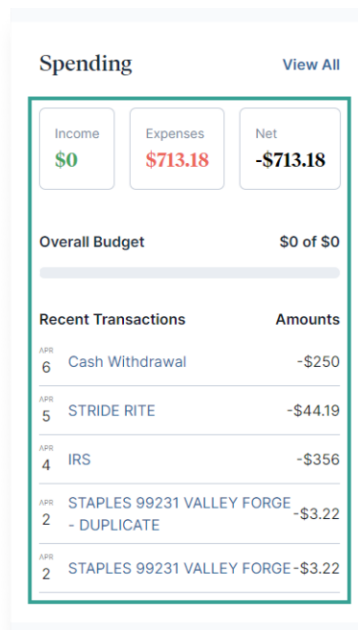
4. **Search** for your institution and select the one where your accounts are held. Enter your institution credentials and click **Connect**. After your credentials are authenticated, your accounts will populate into your Organizer.



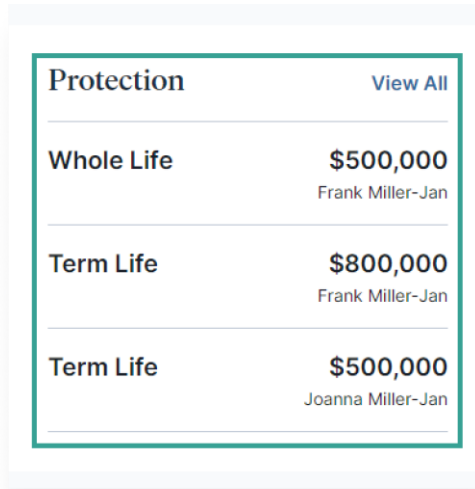
5. Back on the Home page, below Accounts, is a snapshot of your **Goals**, showing each one's projected funding. Red indicates the projected funding is falling short, and green means the Goal is currently projected to be fully funded.



6. Below your Goals is a snapshot of your **Spending**, Overall Budget, and Recent Transactions. After you have connected your bank accounts, such as your Checking account and Credit Cards, your transactions will populate the **Spending** section of your website.

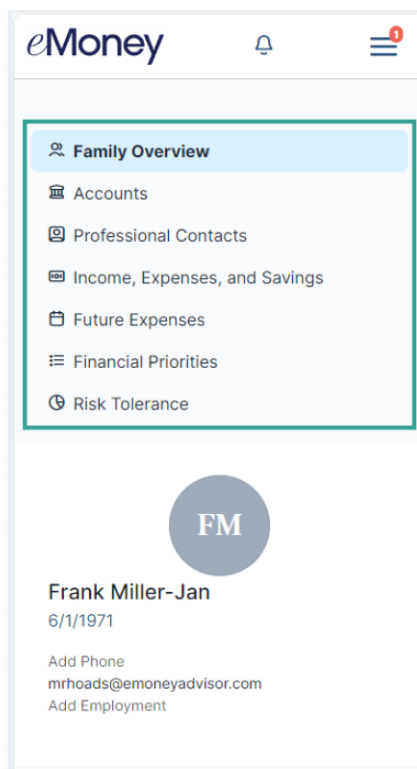


7. Lastly, below Spending is Protection, which displays your three highest valued insurance accounts, i.e., Life Insurance, Homeowners Insurance, Auto Insurance, etc.



## Organizer

The **Organizer** is where you can view and modify your information. Click the corresponding links for more details about Property, Accounts, Income, Expenses, Savings, and Future Goals. To edit your family and contact information, click your name.



## Goals

**Goals** allow you to track funding towards critical financial milestones. Create new Goals by clicking Add Goal and assigning a funding source. You can track existing goals by scrolling down your page. Each goal can be individually analyzed, but the landing screen will give a great view of everything all in one place.

### Goals

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#### Current Goals

Based on your information provided, you are estimated to have **2 of 3 goals fully funded**

[Add Goal](#) ▾

#### Total Portfolio Assets

Assumptions:

Income: \$350,000	Expense: \$786,101
Savings: \$33,500	Net: -\$469,601

Details

The bar chart displays a distribution of assets over time. The vertical axis represents asset value in millions of dollars, ranging from \$1M to \$2.5M. The horizontal axis represents time, with 30 bars. The bars start at approximately \$1.4M, dip slightly, then rise to a peak of about \$2.3M in the middle, before gradually declining to around \$0.8M at the end.

## Spending

1. The **Overview** tab includes a pie chart of your spending by category. You can customize a specific Date Range, view one Account or All Accounts, and view different charts by selecting the View drop-down.
2. The **Budgets** tab helps you track your monthly spending. You can customize your Budget by adding, editing, or deleting categories.
3. The **Transactions** tab contains transactions from your connected accounts sent by your financial institution. The information in both tabs is used to populate your Overview.

The screenshot shows the 'Spending Overview' tab. At the top, there's a navigation bar with 'Overview', 'Budgets', and 'Transactions'. Below this, there are filters for 'Spending by Category', 'Date Range (04/02/2024 to 05/02/2024)', 'Accounts', and 'Categories'. A search bar is at the bottom. The main content features a donut chart with the text 'Spending \$713.18' in the center.

The screenshot shows the 'Spending Budgets' tab. It includes a 'Date Range (05/01/2024 to 05/02/2024)' filter and a '+ Add a Budget' button. The 'Overall Budget' section displays 'Budgeted: \$6,377', 'Spent: \$0', and 'Left: \$6,377'. Below this is a 'View all transactions' link and a progress bar. The 'Categories' section shows 'Auto & Transport' with '\$552 Budgeted' and '\$0 Spent and \$552 Left'.

The screenshot shows the 'Spending Transactions' tab. It features a 'Date Range (04/02/2024 to 05/02/2024)' filter, 'Accounts' and 'Categories' dropdowns, and a search bar. The 'Transaction Details' section shows 'Income: \$0.00', 'Expenses: -\$713.18', and 'Net: -\$713.18'. Below this is a table with columns for 'Date', 'Description', and 'Category'. A 'Pending' transaction is highlighted in a dark blue bar.

Date	Description	Category
Apr 2, 2024	STAPLES VALLEY FORGE DUPLICATE	Merchandise/M

## Investments

1. The **Summary** tab reviews your account Balance History for all Investments. Clicking into an account will filter the Holdings and Balance History on the account level.
2. The **Allocation** tab will display your allocation of your total investment portfolio and individual accounts.

The screenshot shows the eMoney mobile app interface. At the top, there is a header with the eMoney logo, a notification bell, and a menu icon. Below the header, there is a 'Research' button. A navigation bar contains three tabs: 'Summary' (highlighted with a green box), 'Allocation', and 'Analysis'. Below the navigation bar, there is a 'Transactions' section. The main content area is titled 'Accounts' and shows 'All Investments' with a dropdown arrow. Below this, there is a summary of the current value: **Current Value: \$2,470,717.77**. This is broken down into Cash: \$151,003.00 and Holdings: \$1,518,772.77. Below the breakdown, there is a 'Today's change' of **+\$1,425.90** with a green upward arrow and a 0.06% increase. A line chart titled 'Balance History' shows the account value from 2018 to 2024, with the y-axis ranging from \$0 to \$3M. The chart shows a significant increase in 2024. At the bottom, there is a disclaimer: 'Cash, Margin, and Holding quantities reflect changes through the Positions As Of dates below. Account holdings reflect the last available prices as of 05/02/2024 12:48PM. Values are based on the total of all account history values as of the last day of each month in which histories are available.'

The screenshot shows the eMoney mobile app interface. At the top, there is a header with the eMoney logo, a notification bell, and a menu icon. Below the header, there is a 'Research' button. A navigation bar contains three tabs: 'Summary', 'Allocation' (highlighted with a green box), and 'Analysis'. Below the navigation bar, there is a 'Transactions' section. The main content area is titled 'Accounts' and shows 'All Investments' with a dropdown arrow. Below this, there is a pie chart showing the allocation of the total investment portfolio. Below the pie chart, there is a table with columns: 'Equities', 'Value', '% of Type', and '% of Portfolio'. The table lists two equity categories: 'Large-Cap Growth' and 'Large-Cap Value'.

Equities	Value	% of Type	% of Portfolio
Large-Cap Growth	\$427,485.99	31.89%	20.46%
Large-Cap Value	\$233,191.97	17.39%	11.16%



- 3. The **Analysis** tab provides an insightful chart with the net change in total value since your account was added to your Personal Financial Website.
- 4. The **Transactions** tab displays your investment transactions, such as Buys, Sells, and Dividends. This information is coming directly from your connected financial institution.

**Net Change in Total Value Since May 2023**

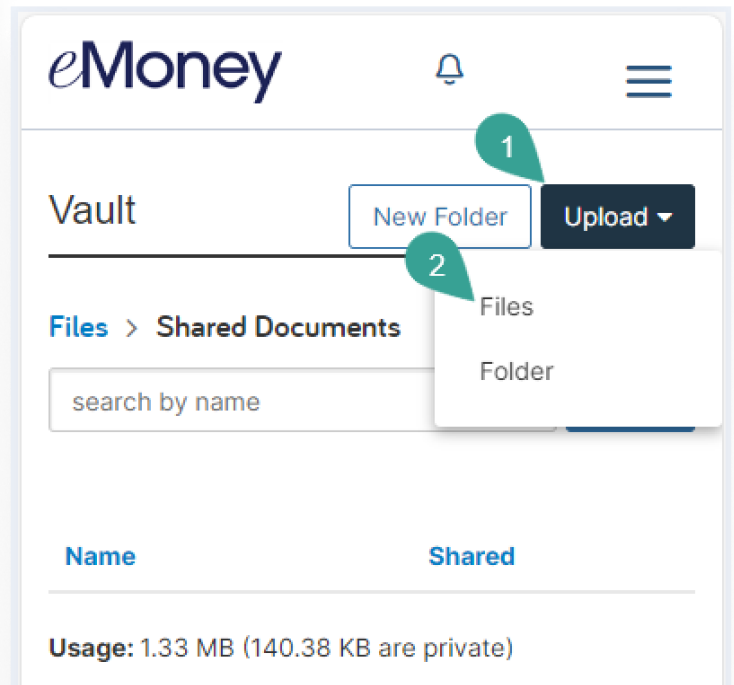
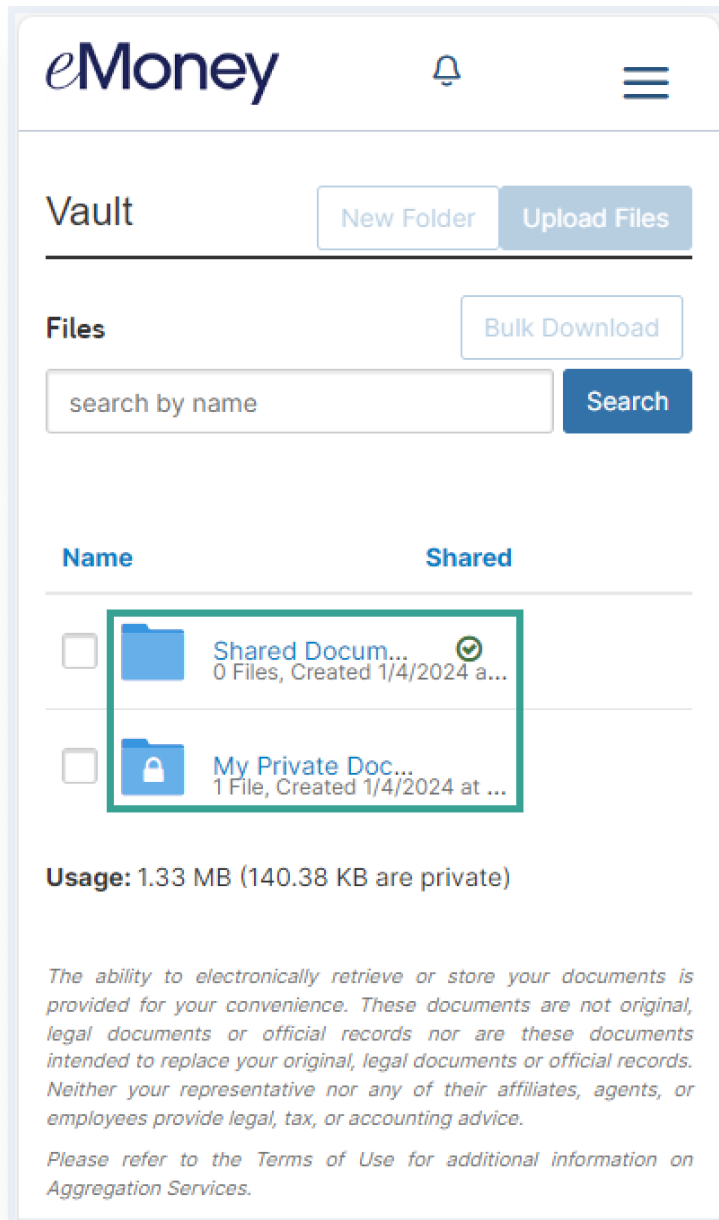
Account	Value (May 2024)
<input type="checkbox"/> Account <sup>†</sup>	
<input checked="" type="checkbox"/> <sup>†</sup> Cash / Emergency Fund	\$25,000.00
<input type="checkbox"/> <sup>†</sup> Easy 123 Checking	\$54,568.00

**Transactions Found: 2**

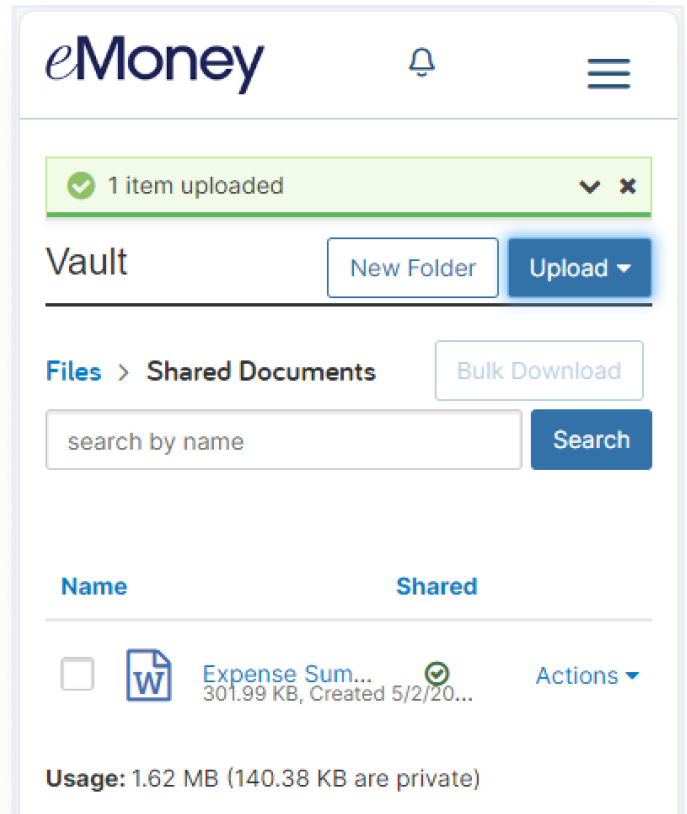
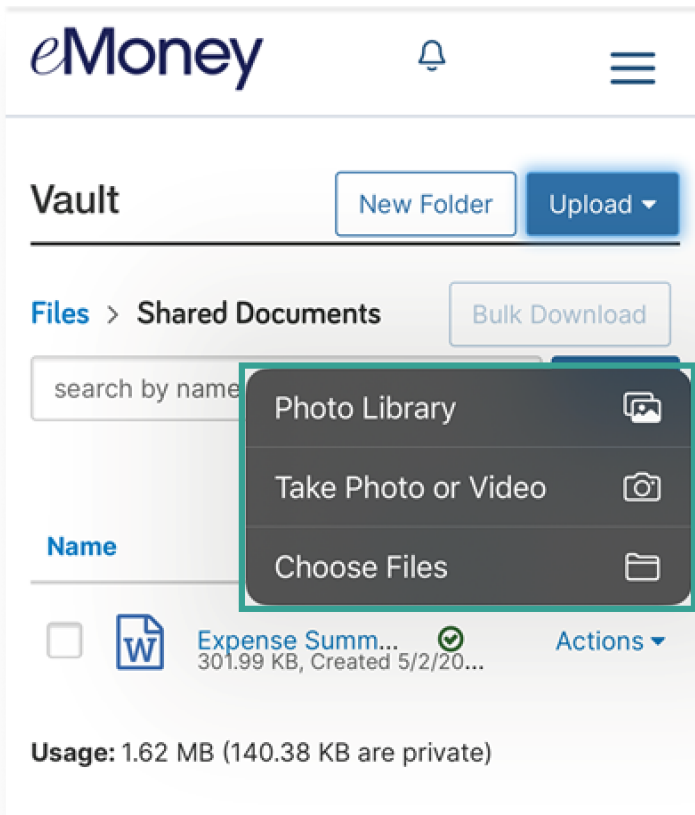
Date	Type	Ticker
Apr 05, 2024	Buy	FKASX
Apr 02, 2024	Buy	FKASX

## Vault

Your **Vault** is where you can access all previously uploaded files and upload new files. To upload a file, click into either the My Private Documents or Shared Documents folder and click **Upload**.



1. Choose to upload from your **Photo Library**, **Take Photo or Video**, or **Choose Files** from your device.

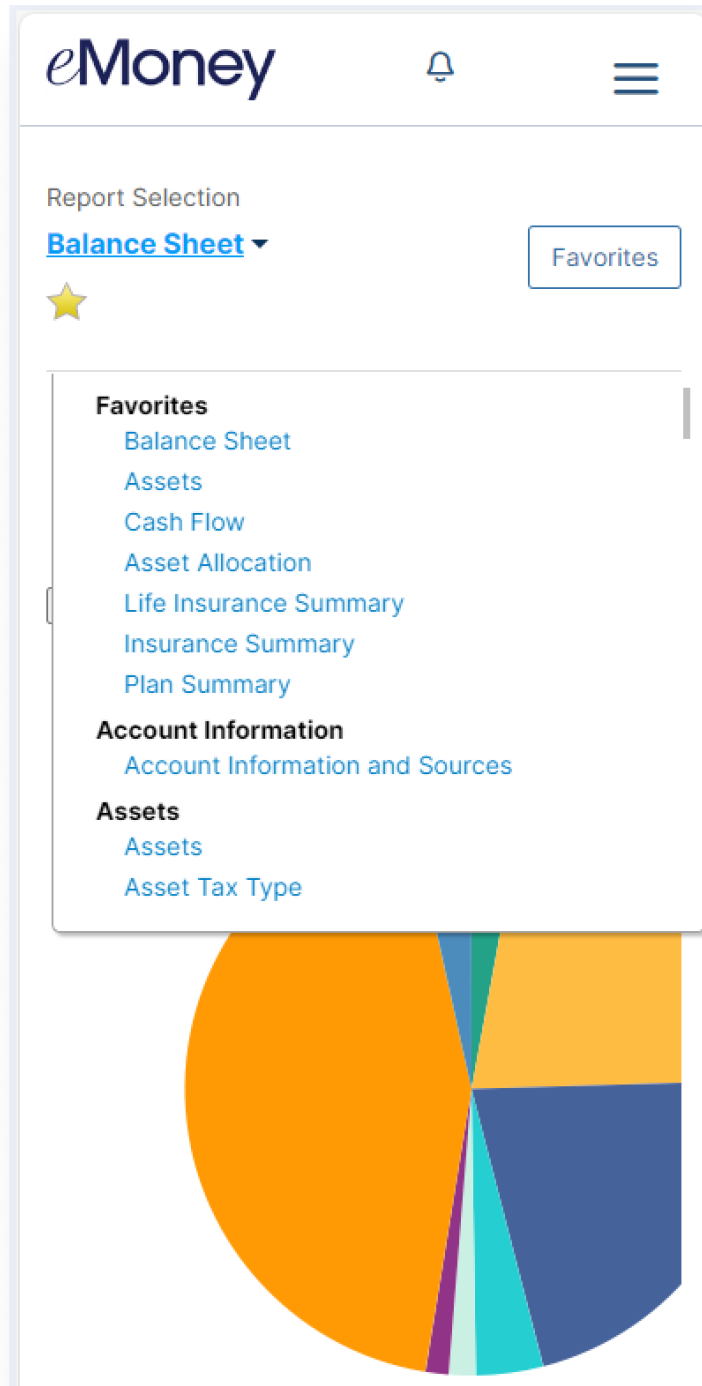


**Note**

- Note that taking a photo with your camera will save the image directly into the Vault and not be stored on your device.
- Most common file types are supported.
- The individual file size limit is 30MB.

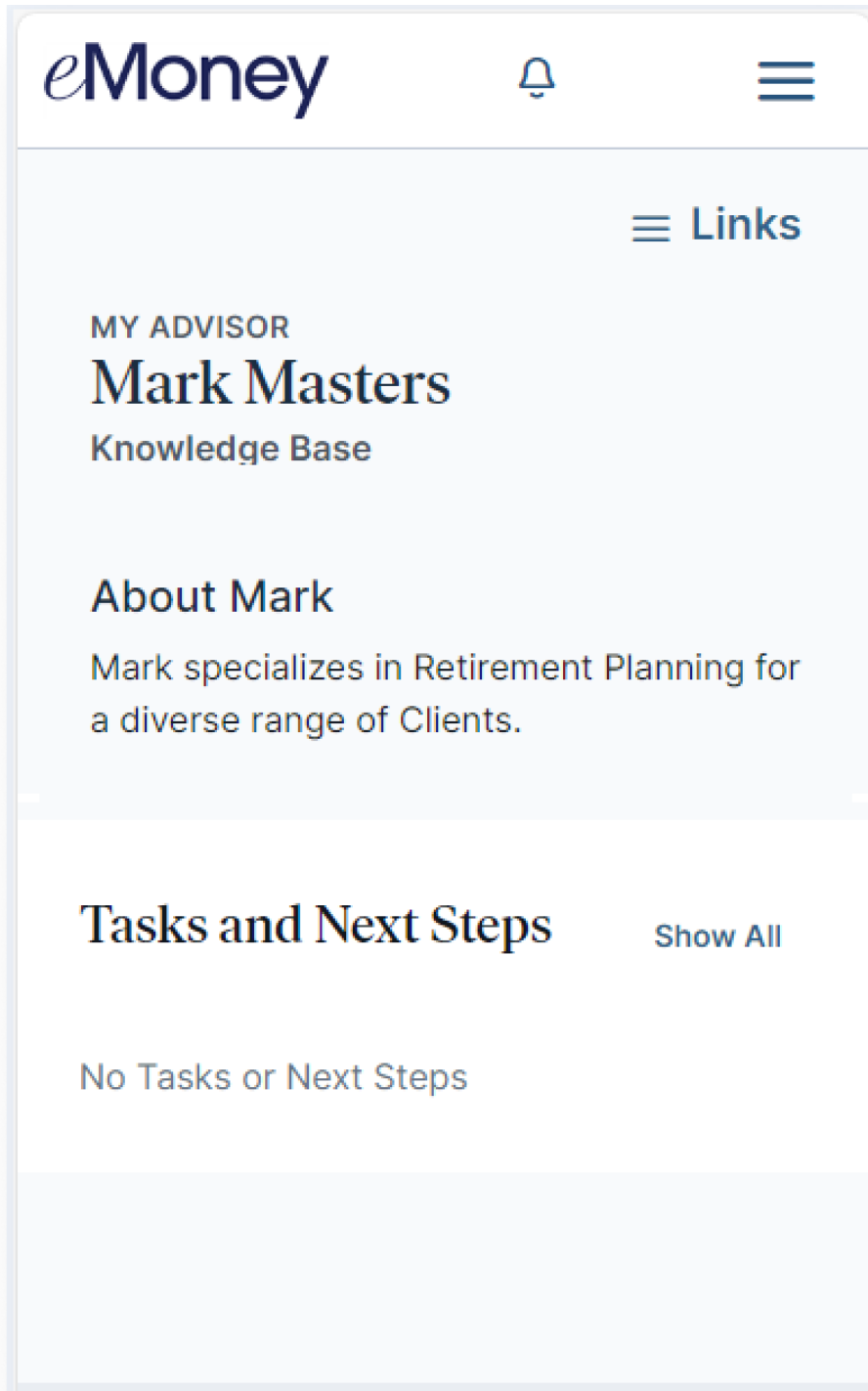
## Reports

Use the Reports page for more investment and portfolio information. Click the **Report Selection** drop-down to see your available reports.



## My Advisor

The **My Advisor** tab shows information and any potential contact links for them.



## Settings

1. The **Alerts** tab allows you to turn various alerts and reminders on and off, such as when your budget exceeds a certain amount, when your insurance policy anniversary is approaching, and more. The **Alerts bell icon** will also trigger notifications.
2. Use the **Security** tab to set up and manage your mobile passcode, password, and security questions.
3. The **Privacy** tab allows you to set up and review your Spending Privacy Permissions.

