

Personal Financial Website Overview

This user guide will provide an overview of the features on your Personal Financial Website. Your website is designed to give you the tools to organize your financial life and help you stay connected with your finances in one simple consolidated view.

Before your first login, you will be prompted to establish three security questions and set up 2-Factor Authentication.

Your **Home** page is a living snapshot of your financial wellbeing, providing a high-level view of your financial information. This page is divided into separate tiles that represent the information contained within a section of the website. Begin customizing your experience by clicking the **gear icon** in your Net Worth and Investments tiles.

PERSONAL FINANCIAL WEBSITE

Home Organizer Workshop Spending Investments Vault Reports Help Settings Sign Out

Welcome,
Frank and Joanna Miller

Accounts	+ Add Account
Cash	\$25,000
Credit Cards	-\$3,643
Taxable	\$62,684
Tax Advantaged	\$451,838
Life Ins Cash Values	\$14,500
Loans	-\$426,385
Property	\$1,295,000
Stock Options	\$0

Net Worth

\$1,254,345
as of today

↓ \$581,222 this month ↓ \$421,668 year to date

Investments

\$726,180¹
as of today

↓ \$1,320² Change ↓ -0.18%² Change

Spending [View All](#)

\$0 Income	\$1,402 Expenses	-\$1,402 Net
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Overall Budget: \$0 of \$0

Recent Transactions	Amounts
JUL 15 WAWA 666 TOWN	-\$80.00
JUL 14 Cash Withdrawal	-\$250.00
JUL 12 IRS	-\$356.00
JUL 10 STAPLES 99231 VALLEY FORGE	-\$3.22
JUL 8 PAYMENT	-\$1.00

Protection [View All](#)

Whole Life	\$1,000,000
Frank Miller	

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The **Organizer** will help you to consolidate all your important financial information into one place. You can click the **sections** on the left-hand side to add your accounts, financial data, people and property. The information within the Organizer will be used to populate other areas of the website, including the Home page.

The screenshot shows the 'Organizer' section of the Personal Financial Website. At the top, a navigation bar includes 'Home', 'Organizer' (highlighted with a red box), 'Workshop', 'Spending', 'Investments', 'Vault', 'Reports', and notification icons. On the right, there are links for 'Help', 'Settings', and 'Sign Out'. The main content area is divided into three sections:

- Accounts:** A vertical list of links on the left: 'Accounts', 'Professional Contacts', 'Income, Expenses, and Savings', 'Future Goals', 'Financial Priorities', and 'Risk Tolerance'.
- Individual Profiles:** Two profiles are shown side-by-side:
 - Frank Miller:** Includes a phone icon with '(867) 555-5555', an email icon with 'tedelstein@emoneyadvisor.com', a calendar icon with '6/1/1967', and a briefcase icon with 'Owner at Buckingham Engineering'. A circular avatar with 'FM' is to the right.
 - Joanna Miller:** Includes a phone icon with '(867) 333-3333', an email icon with 'jmiller@no-mail.com', a calendar icon with '3/20/1968', and a briefcase icon with 'Nurse at Bryn Mawr Hospital'. A circular avatar with 'JM' is to the right.
- People:** A horizontal row of five circular avatars with initials: 'PM' (Peter), 'MM' (Mary Beth), 'LM' (Lucas), 'EG' (Elaine), and 'SM' (Stephanie). An 'Add Person' button is on the right.
- Property:** A horizontal row of four colored boxes with icons and labels: a purple box with a diamond icon labeled 'Cars', a green box with a house icon labeled 'Home', a purple box with a diamond icon labeled 'Jewelry', and a green box with a house icon labeled 'Vacation Mountain Home'. An 'Add Property' button is on the right.

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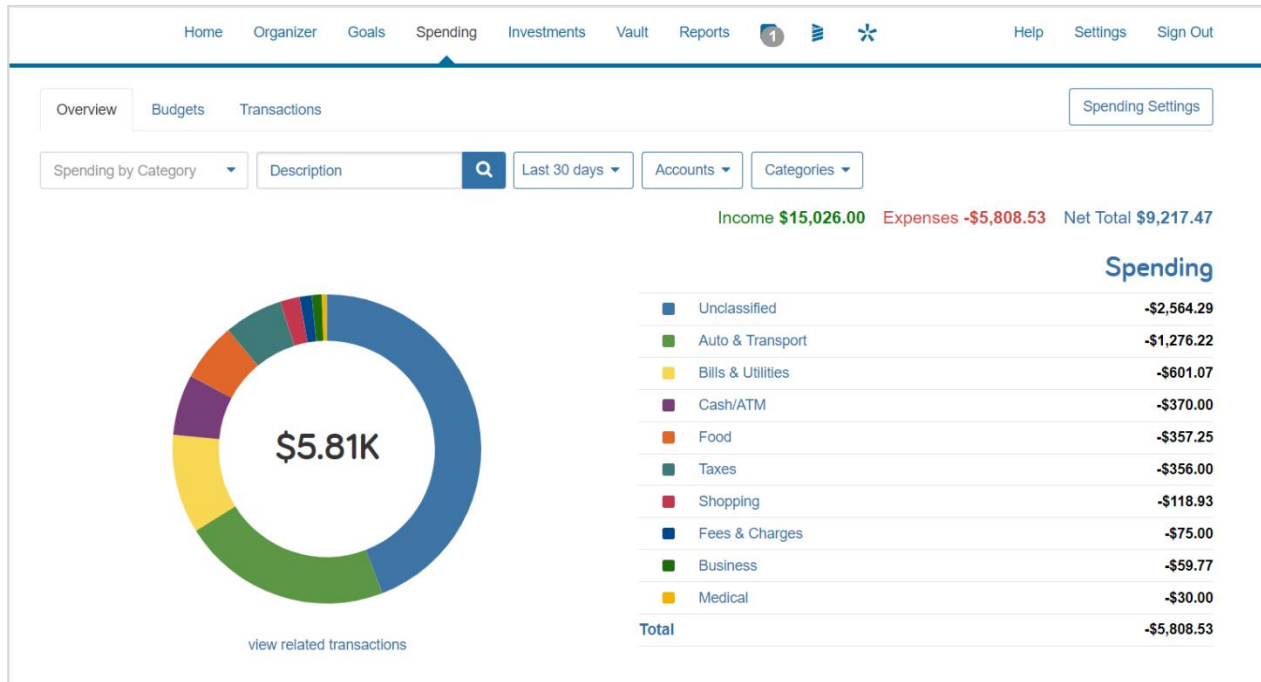
The **Workshop** page can help you take a closer look at your retirement strategy, insurance protection, and education goals. Select a Workshop then verify you've completed the appropriate Organizer sections before you begin.

The screenshot shows the top navigation bar of the Personal Financial Website. The 'Workshop' menu item is highlighted with a red box. Below the navigation bar is a large banner for the 'Financial Workshop' featuring a woman and a 'play video' button. Below the banner are five interactive cards, each with a 'new' tag. The third card, 'Are you saving enough for retirement?', is highlighted with a red box. The footer contains contact information for Marcus Masters, a site map, and resources.

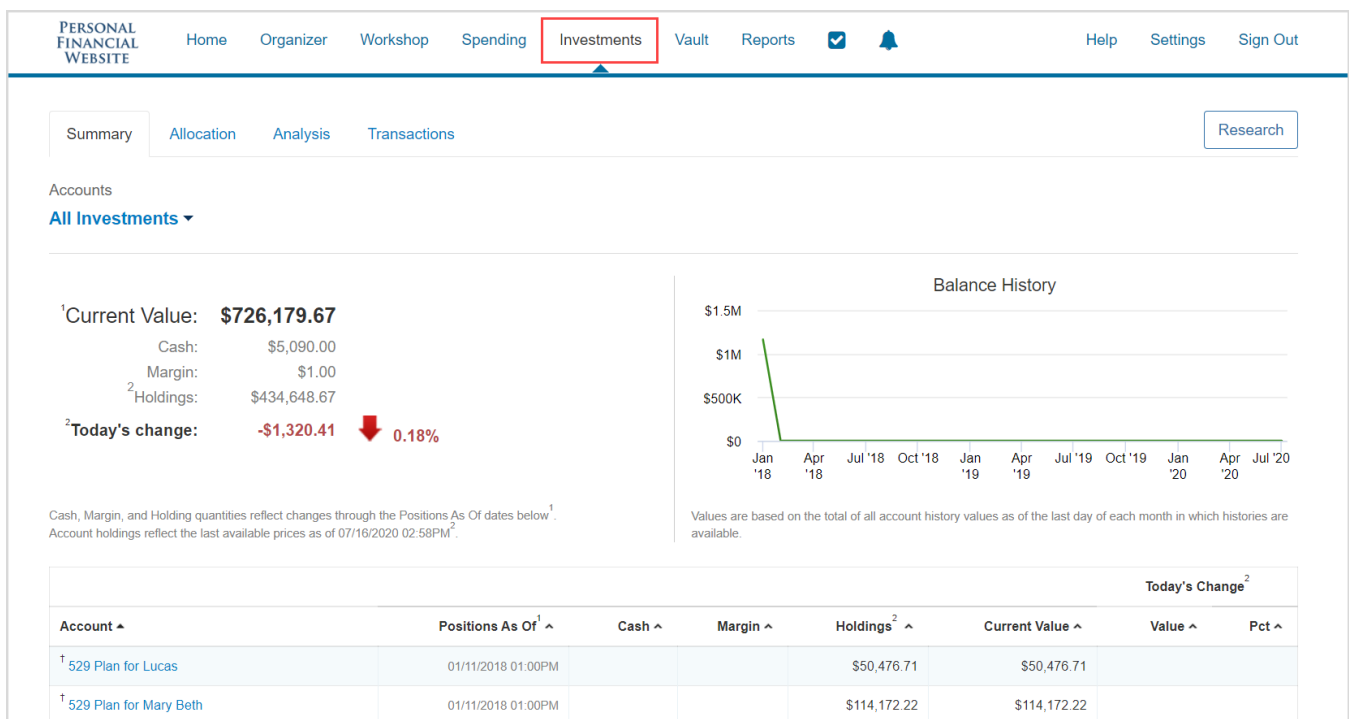
This screenshot shows the 'Are you saving enough for retirement?' workshop page. At the top, there are navigation steps: 1 Intro (selected), 2 Your Strategy, 3 Next Steps, and a 'back to workshop' button. The main content area features a video player with the word 'RETIREMENT' in large green letters. To the right of the video, there is a heading 'Take a look at your retirement strategy.' followed by a paragraph: 'Find out how much your retirement will cost and see if you're on track to afford it.' Below this is a section titled 'Before you begin' with a list of Organizer sections: 'Accounts', 'Family and Friends', and 'Income, Expenses, and Savings'. A 'Begin' button is located at the bottom right of the content area.

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The **Spending** page gives you a clear view of what you're spending each month. This area includes an **Overview**, **Budgets** tab, and **Transactions** tab. Use these three tabs together to create an accurate view of your spending and your current budget. Note that if there is no information on this screen, it is because a bank account or credit card needs to be added to the Accounts section within in your Organizer.

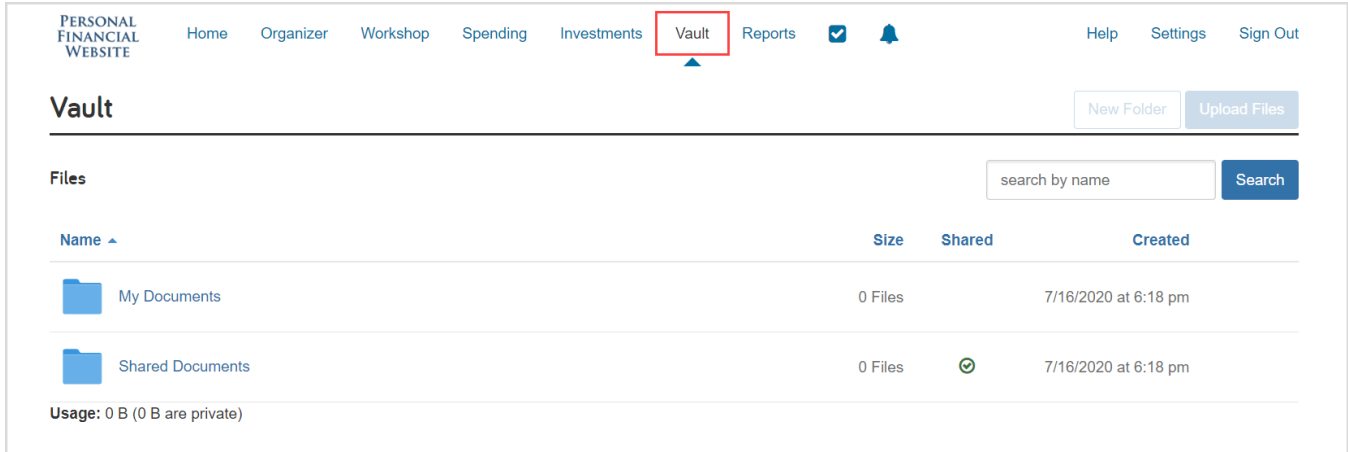


The **Investments** page is made up of four components – Summary, Allocation, Analysis, and Transactions. These will provide you with an overall view of your investments as well as the ability to view individual account activity and asset breakdowns.



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The **Vault** is a secure, searchable repository in which files are stored by your Advisor for your review, and where you can store files. To upload a file, click either the My Documents or Shared Documents folder, then click **Upload Files**. The My Documents folder is hidden from your Advisor, however, if you want your Advisor to see a document, upload into the Shared Documents folder.



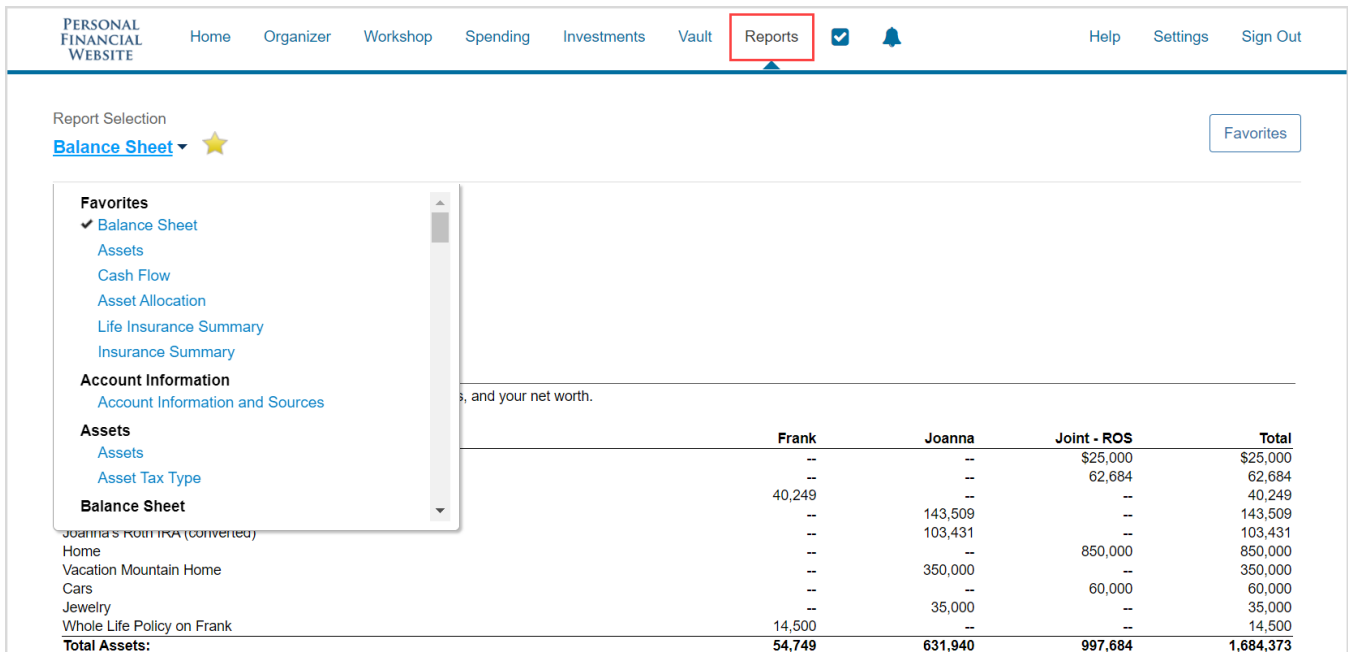
Vault

Files

Name	Size	Shared	Created
My Documents	0 Files		7/16/2020 at 6:18 pm
Shared Documents	0 Files		7/16/2020 at 6:18 pm

Usage: 0 B (0 B are private)

The **Reports** page provides you with a series of reports about your current financial situation.

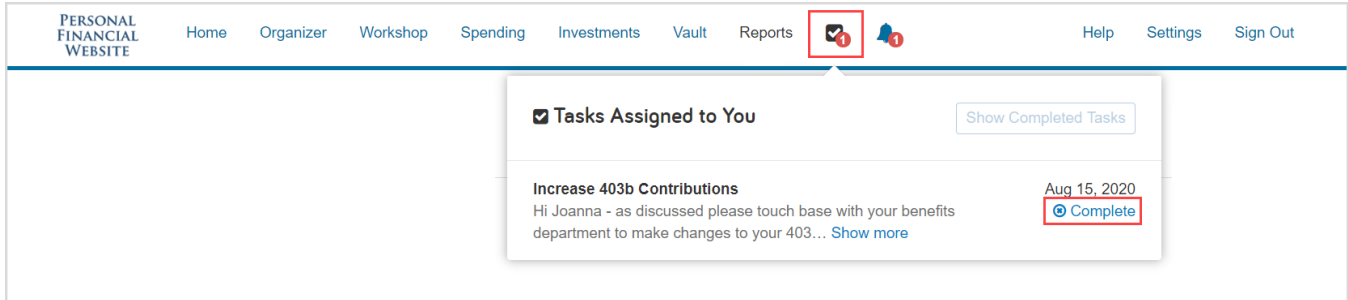


Report Selection: **Balance Sheet**

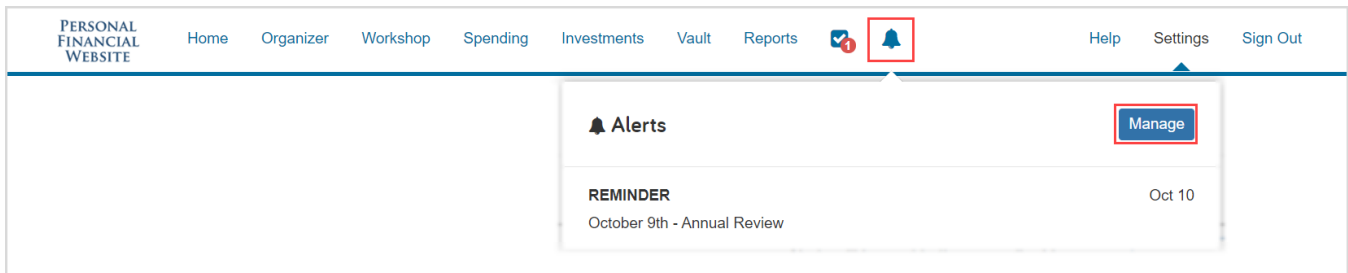
	Frank	Joanna	Joint - ROS	Total
Assets	--	--	\$25,000	\$25,000
Asset Tax Type	--	--	62,684	62,684
Balance Sheet	40,249	--	--	40,249
Joanna's ROTH IRA (converted)	--	143,509	--	143,509
Home	--	103,431	--	103,431
Vacation Mountain Home	--	--	850,000	850,000
Cars	--	350,000	--	350,000
Jewelry	--	--	60,000	60,000
Whole Life Policy on Frank	14,500	--	--	35,000
Total Assets:	54,749	631,940	997,684	1,684,373

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The **Tasks** icon will alert you of any tasks assigned to you by your Advisor. Click **Complete** when you've finished the task to notify your Advisor.



The **Alerts** icon allows you to view any triggered alerts. Click **Manage** to set up your Alert parameters.



The **Settings** page is where you can set Alerts, update your Security information, such as passwords and security questions, and set your Privacy Settings which allows you to determine what level of access your Advisor has when viewing your Spending and Budgeting data.

