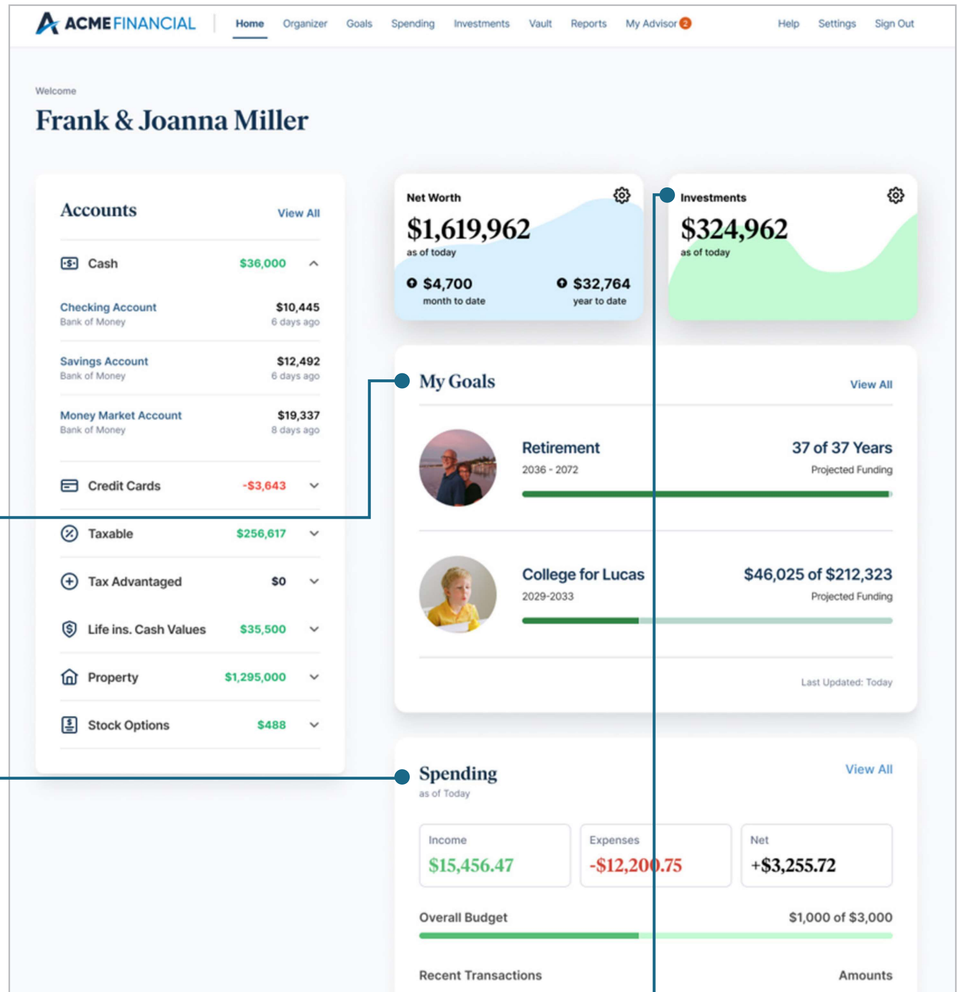
eMoney

YOUR CLIENT PORTAL

A Guide to Your Client Portal

Engage with your finances, save time, and communicate with your advisor.



Home Screen

Gain a holistic view of your financial picture at a glance. Click on the tiles for more detailed information.

Organizer and Aggregation

Use the aggregation tool within organizer to connect your financial institutions and to view all your accounts and investments in one place, in real time.

Goals

Easily add goals, track your progress toward funding those goals, and visualize how your goals impact your long-term financial outlook.

Spending

Quickly see where your money is going each month, establish a budget to manage your expenses, and make adjustments based on actual spending, saving and investment data.

Investments

Monitor your investment performance and asset allocation.

Vault

Upload important documents for safe keeping in the vault, which is protected by the highest level of security in the industry. There are private folders, which are just for you, and shared folders, where you can easily share documents with your advisor.