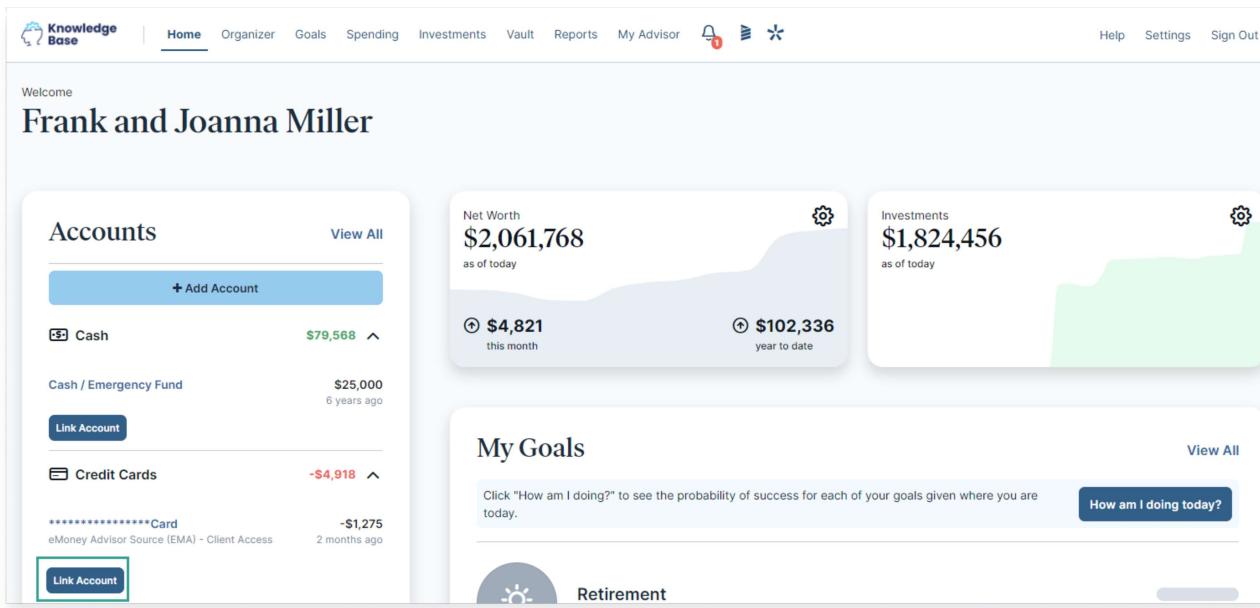


Link Manually Entered Accounts

Personal Financial Website

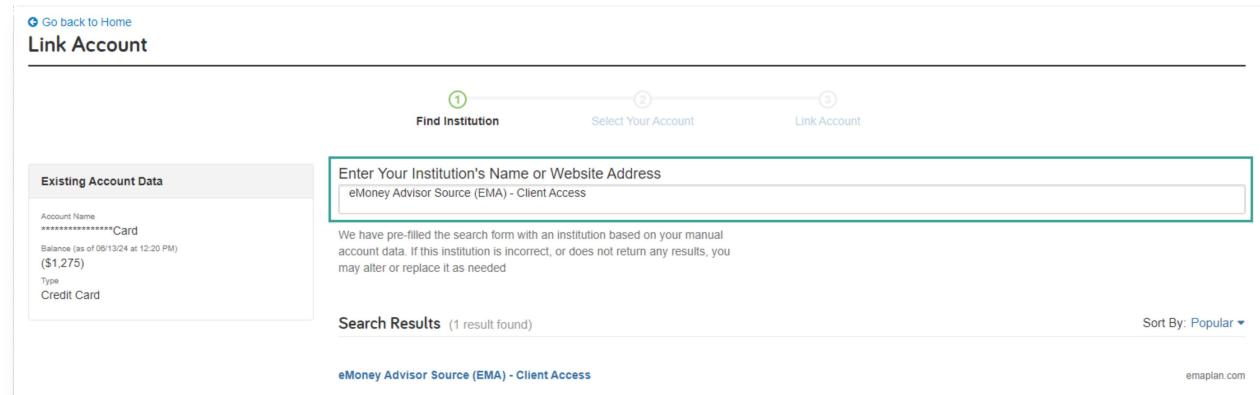
This guide demonstrates how to connect your manually entered facts. You will go through this process on an account basis. There are many benefits to connecting your accounts, the most important being able to have up-to-date access to account balances and information. To begin, log in to your Personal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



The screenshot shows the 'Accounts' section of the Home page. It displays a list of accounts with their current balance and a 'Link Account' button. The 'Link Account' button for the '*****Card' account is highlighted with a green box.

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**.



The screenshot shows the 'Link Account' search interface. The search bar contains 'eMoney Advisor Source (EMA) - Client Access'. The search results list one result: 'eMoney Advisor Source (EMA) - Client Access'. The result is sorted by 'Popular'.

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.

Link Manually Entered Accounts

Personal Financial Website

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

1 Find Institution 2 Select Your Account 3 Link Account

Existing Account Data

Account Name	*****Card
Balance (as of 06/13/24 at 12:20 PM)	(\$1,275)
Type	Credit Card

Selected Institution

eMoney eMoney Advisor Source (EMA) - Client Access wealth.emaplan.com

Select Account

You've successfully linked eMoney Advisor Source (EMA) - Client Access. Please select the account below that best matches your existing account to continue.

Account	Type	Balance
*****Card	Credit Card	-\$1,275 Jun 13, 2024 12:24 PM
Easy 123 Checking	Checking	\$54,568 Jun 13, 2024 12:24 PM
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](#) Continue 

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

[Go back to Home](#)

Link Account

1 Find Institution 2 Select Your Account 3 Link Account

Existing Account Data

Account Name	*****Card
Balance (as of 06/13/24 at 12:20 PM)	(\$1,275)
Type	Credit Card

Selected Institution

eMoney eMoney Advisor Source (EMA) - Client Access wealth.emaplan.com

Confirm Account

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.

Existing Account	Online Account
Account	*****Card
Type	Credit Card
Balance	(\$1,275) 06/13/24 at 12:20 PM

[Previous](#) Link Account 

Link Manually Entered Accounts

Personal Financial Website

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

[Go back to Home](#)

Link 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](#)