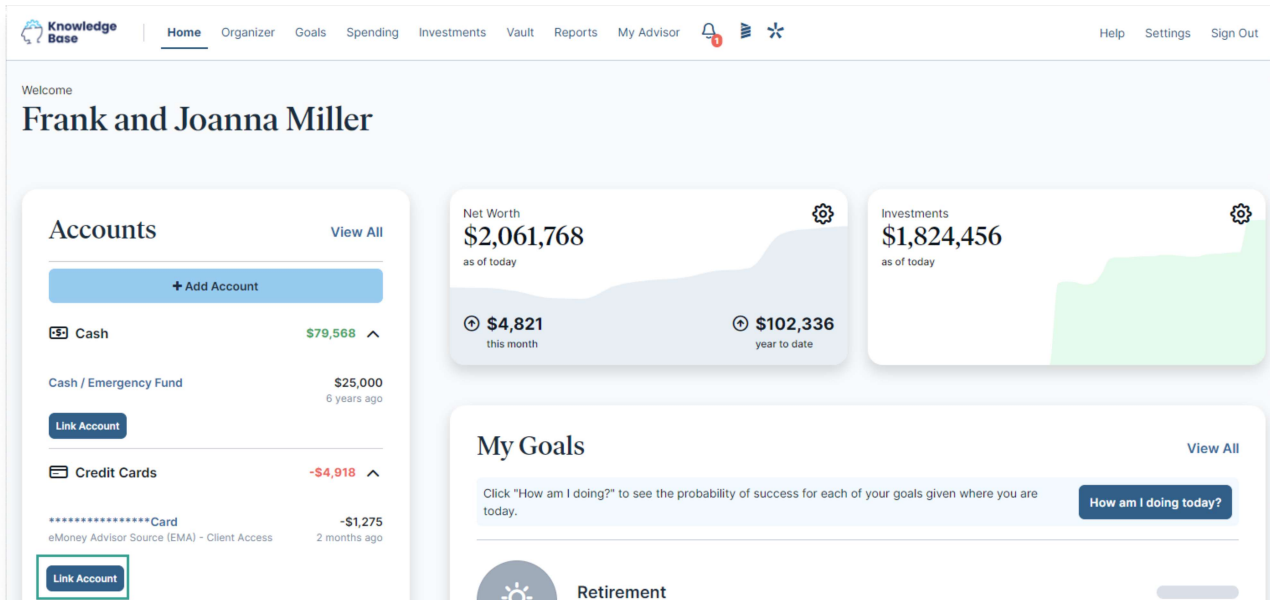
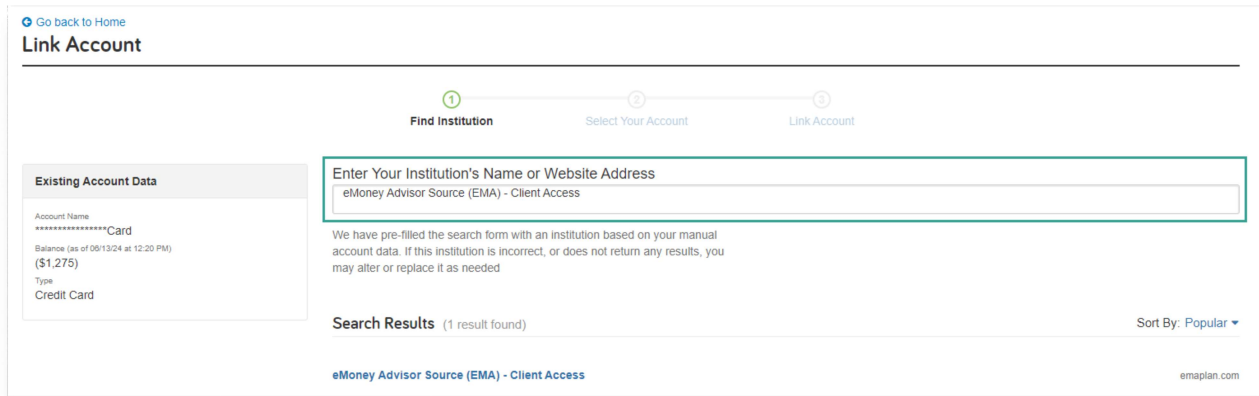


This guide demonstrates how to connect your manually entered facts. You will go through this process on an account basis. There are many benefits to connecting your accounts, the most important being able to have up-to-date access to account balances and information. To begin, log in to your Personal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

- 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.



- 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**.



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.

- 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.
- 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

1Find Institution


2Select Your Account

3Link Account

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

**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
<input checked="" type="radio"/> *****Card	Credit Card	-\$1,275 Jun 13, 2024 12:24 PM
<input type="radio"/> Easy 123 Checking	Checking	\$54,568 Jun 13, 2024 12:24 PM
<input type="radio"/> Orion Investments (**9174)	Taxable Investment	\$320,249 Jun 13, 2024 12:24 PM

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

Have another online login to eMoney Advisor Source (EMA) - Client Access? [Add another eMoney Advisor Source \(EMA\) - Client Access login now.](#)

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Continue

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

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## Link Account

1Find Institution


2Select Your Account

3Link Account

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

**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	*****Card
Type	Credit Card	Credit Card
Balance	(\$1,275) 06/13/24 at 12:20 PM	-\$1,275 Jun 13, 2024 12:24 PM

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

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Link Account

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

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### Link Account

1

2

3

Find InstitutionSelect Your AccountLink Account

✔

**Your account is now linked.**

All of your accounts are now Online. Click "Done" to return to the Home Page.

DoneContinue