# **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 from the desktop version, including a consolidated view of your information.

**Please note:** To access your website, use your normal login URL. You can refer to the confirmation email sent to you when you first registered your access.

1. From the log in screen, enter in your **credentials** and click **Sign In**. You may be prompted with a security challenge or to enter in a passcode if you previously set one up. Security Questions and Passcodes are managed from the Security Settings outlined later in this guide.

Personal Financial Website	Answer your security question When were you married (mm/dd/yyyy)?
Username	· · · · · · · · · · · · · · · · · · ·
	Don't ask me again for this device
Password	Continue
Sign In	G Back to Sign In
Forgot your password?	and the second se

 Once successfully authenticated, you will be taken to your Home page which consolidates all the data we have entered into your website so far. We will dive into each feature from the **MENU** drop-down; Click the **categories** below for quick access to a specific page.



Home Organizer Spending Vault Settings

### **Mobile Website Overview**

#### Home

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

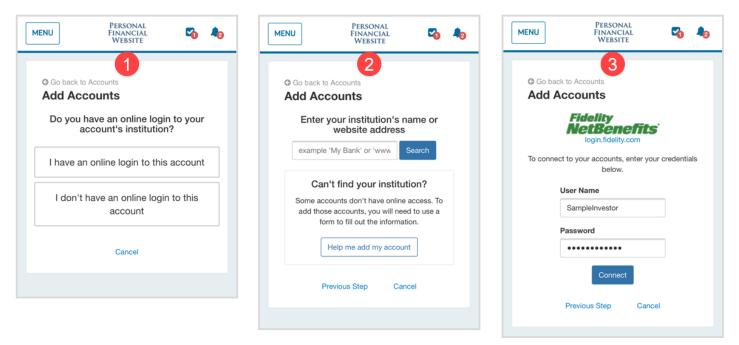
MENU FIN/	SONAL ANCIAL SITE	42	MENU	Personal Financial Website	<b>Co 4</b> 0
Welcome, Frank and Joann	a Miller		Net Wort	h	~
Net Worth	[	•	\$1,342	,887	
<b>\$1,342,887</b> as of today			as of today <b>\$0</b> this month		<b>♦ \$333,126</b> year to date
<b>\$0</b> this month	<b>↓ \$333,12</b> year to dat				
			Net Wort	h	
Investments		<u> </u>	\$1,342,88	7 as of today	
<b>\$1,222,235</b> <sup>*</sup> as of today			This month	\$0	0.00%
<b>↑</b> \$13,738 <sup>2</sup>	★ 1.14%		YTD	-\$333.1K	-19.88%
Change	Chang	je			OK Cancel

2. As you scroll 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 are not listed, click **+ Add Account** to connect to your financial institution.

MENU PERSO FINAN WEBS	CIAL 🏠 🦣
Accounts	+ Add Account
Cash	\$79,568 V
Credit Cards	-\$4,918 🗸
Taxable	\$382,933 ^
Frank and Joanna Joint Fidelity Investments	<b>\$62,684</b> As of 7/16/2020 at 5:56pm
Taxable Investment Sample Institution	<b>\$320,249</b> As of 8/14/2020 at 7:14pm

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- 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 manually add your account. For this example, we will select 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.
- 5. Enter your institution **credentials** and click **Connect.** After your credentials are successfully authenticated, your accounts will populate into your Organizer.

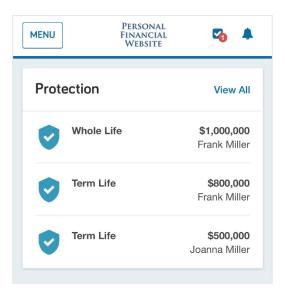


6. Back on the Home page, below Accounts, is a snapshot of your Spending, Overall Budget, and Recent Transactions. After you have connected your bank accounts, such as your Checking account and Credit Cards, your transactions will pull populate the Spending section of your website.

MENU	PERSONAL FINANCIAL WEBSITE	S 4
Spending		View All
	\$0 Income	
	\$713 Expenses	
	-\$713 Net	
Overall Budge	ı	\$653 of \$4,572
Recent Transa	ctions Amou	ints
7 Cash With	drawal -\$250	0.00
6 STRIDE R	TE -\$44.19	

### **Mobile Website Overview**

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



### Organizer

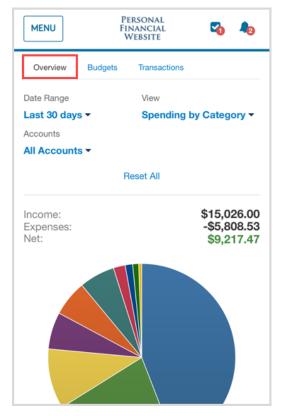
1. The Organizer is where you can view and modify your information. Click the corresponding links to view more detail about Property, Accounts, Income, Expenses, Savings, and Future Goals. To edit Family and Contact information, simply click your **name**.

Personal Financial Website	<b>v</b> 40
3	
nd Savings	
5	(FM)
oneyadvisor.com	
ingham Engineering	
	FINANCIAL

# **Mobile Website Overview**

### 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, as well as view different charts by selecting the View dropdown. This feature is a great way to stay on top of your income and expenses!
- 2. The **Budgets** tab helps you track what you are spending on a monthly basis. 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.



MENU	PI FI V	2	•	
Overview	Budgets	Transactions		
Date Range				
This Month	•			
	🕒 A	dd a Budget		
Se Overall Bud	ep 10 get			
\$713 spent / \$	-			
view all transa	ations for this	period	\$1,347	
Shopping	CUONS IOF THE	penod		
\$47 spent / \$1	03 left		\$150	X
view 2 transac	tions		¢100	
Auto & Trans	oort			
\$0 spent / \$20				-
l			\$200	X
Business				
\$60 spent / \$9	0 left			
(			\$150	X

MEI	NU PERSONAL Financial Website	1 2
Ove	rview Budgets Transaction	S
L Exp	ort Last 30 days /All	Q Filters
Income	\$15,026.00 Exp -\$5,808.53	Net \$9,217.47
	Pending	
SEP 03	STAPLES VALLEY FORGE DU Sports & Hobbies	
AUG 24	WHOLE FOODS MARKET DU Groceries	JPLIC\$80.25
	2020	
SEP 07	CASH WITHDRAWAL Cash/ATM	-\$250.00
SEP 06	STRIDE RITE Clothing	-\$44.19
SEP 05	IRS Federal Tax	-\$356.00
SEP 03	STAPLES VALLEY FORGE Business	-\$56.55
SEP 03	STAPLES VALLEY FORGE Business	-\$3.22
SEP 01	PAYMENT Credit Card Payment	-\$1.00

### **Mobile Website Overview**

### Vault

- 1. Your **Vault** is where you can access all previously uploaded files as well as upload new files. To upload a file, click into either the **My Private Documents** or **Shared Documents folder**.
- 2. Click Upload Files
- 3. Choose from the available options. Note that when you take a photo with your camera, it will save directly into the Vault and not be stored on your device.

MENU	Personal Financial Website	6	MENU	Personal Financial Website	6
Vault	New Folder	Upload Files	Vault	New Folder	Upload Files
iles			Files > My Private I		
search by name		Search	search by name		Search
Name 🔺	Shar	ed	Name 🔺	Shared	
My Privat 0 Files, Cre	te Docume eated 7/16/2020 at 11:		Birth Certifica 0 Files, Created	ates d 7/16/2020 at 11:	Actions -
Shared D	ocuments Ø		Children's Do	ocuments 3	Actions -
0 Files, Cre			Take Photo or Video	)	ÍO.
	,		Photo Library		
			Browse		•••
			o mico, orcator	Cancel	

#### **Please Note:**

- Most common file types are supported.
- The individual file size limit is 30MB.

### **Mobile Website Overview**

#### Settings

- 1. The **Alerts** tab allows you to enable and disable various alerts and reminders, 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.

MENU PERSONAL FINANCIAL WEBSITE 🏹 42	MENU PERSONAL FINANCIAL VEBSITE	PERSONAL FINANCIAL
Alerts Security Privacy	Alerts Security Privacy	Alerts Security Privacy
Delivery Settings	Change Passcode	
1 Email Recipients   Alerts will be sent to these email addresses Show •	You can set a passcode of 4 or more digits from easy sign in from a mobile device. Passcode is only for mobile users.	<b>Privacy Settings</b> This page allows you to manage your privacy settings. Use the controls below to determine how much access each individual has to your financial information.
On Home Page Notifications	New Passcode:	
Show notifications on your 14 days home page for	Verify Passcode:	My Advisor Marcus Masters Advisor
Personal Finance	Change Password	Marcus Masters Site Map Resources
Weekly Financial Summary	Old Password:	8910 University Home Investments Join Screen Center Lane Organizer Vault Sharing
A periodic overview of your finances (email only)	New Password:	San Diego, CA Goals Reports Session 92122 Spending test@emoneyadvisor.com
Low Cash Balance		Contact Marcus
When the balance of <u>any cash</u> - \$500 +	Verify Password:	
High Credit Balance	Save	