

## YOUR PERSONAL FINANCIAL WEBSITE

# A Guide to Getting Started

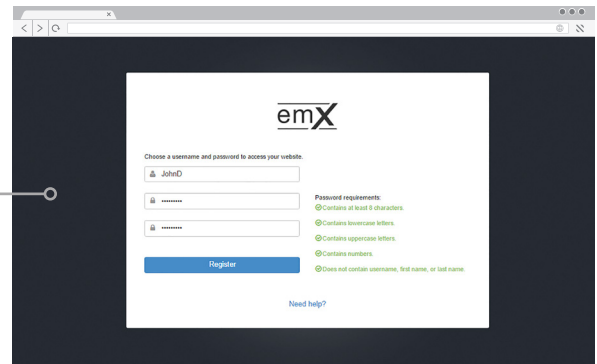
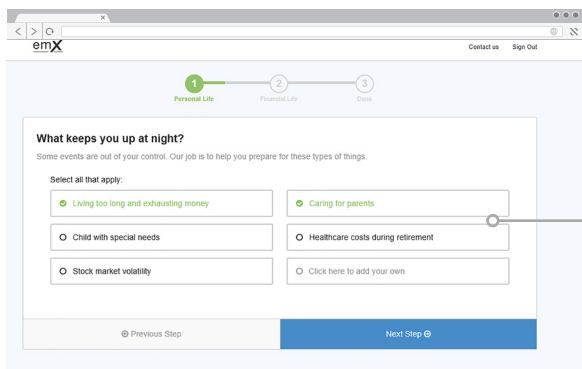
## Manage your wealth *and* your well-being

Your Personal Financial Website helps you see your financial life beyond the numbers. And with our automated fact finding questionnaire, you can get started with your Personal Financial Website on your own in just a few easy steps.

### STEP 1

#### Register for your financial website

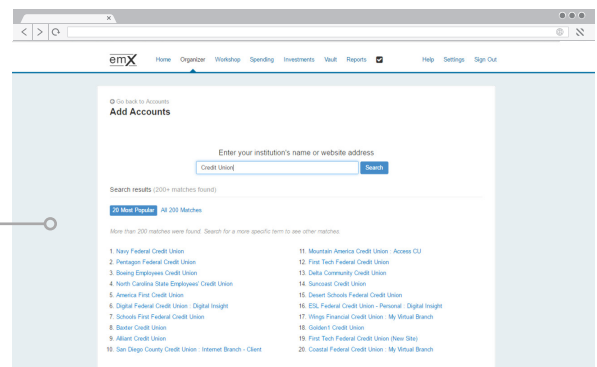
Click the link sent to your inbox to get started.  
Then, create your own secure user name and password.

A screenshot of a web browser showing the emX registration page. The page has a dark header with the emX logo. Below the logo, there's a section titled "Choose a username and password to access your website." It contains two input fields: "JohnID" for the username and a masked password. To the right of these fields are "Password requirements:" listed as: "Contains at least 8 characters", "Contains uppercase letters", "Contains lowercase letters", "Contains numbers", and "Does not contain username, first name, or last name". Below the input fields is a blue "Register" button and a link for "Need help?".A screenshot of a web browser showing the emX questionnaire. The page has a light blue header with the emX logo and navigation links: "Contact us" and "Sign Out". Below the header is a progress bar with three steps: "1 Personal Life", "2 Financial Life", and "3 Done". The main content area is titled "What keeps you up at night?" and includes a sub-header "Some events are out of your control. Our job is to help you prepare for these types of things." Below this is a section "Select all that apply:" with two columns of radio button options. The first column includes "Living too long and exhausting money", "Child with special needs", and "Stock market volatility". The second column includes "Caring for parents", "Healthcare costs during retirement", and "Click here to add your own". At the bottom are two buttons: "Previous Step" and "Next Step".

### STEP 2

#### Complete the series of introductory questions

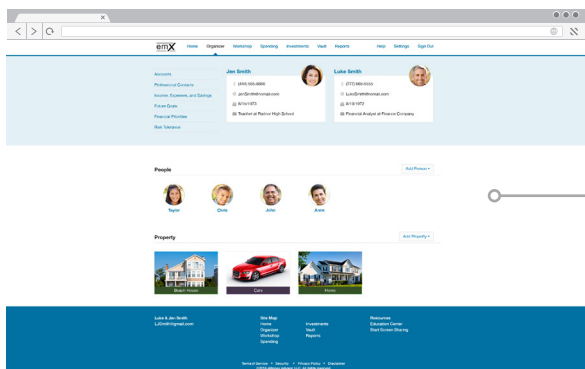
Answer a few basic questions to help us understand your current finances and future goals.

A screenshot of a web browser showing the emX "Add Accounts" page. The page has a dark header with the emX logo and navigation links: "Home", "Organizer", "Workshop", "Spending", "Investments", "Vault", "Reports", "Help", "Settings", and "Sign Out". Below the header is a section titled "Add Accounts" with a sub-header "Go back to Accounts". It contains a text input field "Enter your institution's name or website address" and a "Search" button. Below the input field is a "Search results (200+ matches found)" section. It shows a list of 20 results, with the first 10 displayed. The results are: 1. Navy Federal Credit Union, 2. Pentagon Federal Credit Union, 3. Boeing Employees Credit Union, 4. North Carolina State Employees' Credit Union, 5. America First Credit Union, 6. Digital Federal Credit Union - Digital Insight, 7. Schools First Federal Credit Union, 8. Baxter Credit Union, 9. Alliant Credit Union, 10. San Diego County Credit Union - Internet Branch - Client, 11. Mountain America Credit Union - Access CU, 12. First Tech Federal Credit Union, 13. Delta Community Credit Union, 14. Suncoast Credit Union, 15. Desert Schools Federal Credit Union, 16. ECU Federal Credit Union - Personal - Digital Insight, 17. Allstate Financial Credit Union - My Virtual Branch, 18. Golden1 Credit Union, 19. First Tech Federal Credit Union (Paseo Site), 20. Coastal Federal Credit Union - My Virtual Branch.

### STEP 3

#### Connect your financial accounts

From your Homepage, click on Organizer, then Accounts to start adding your financial institutions, like bank and credit accounts.



## STEP 4

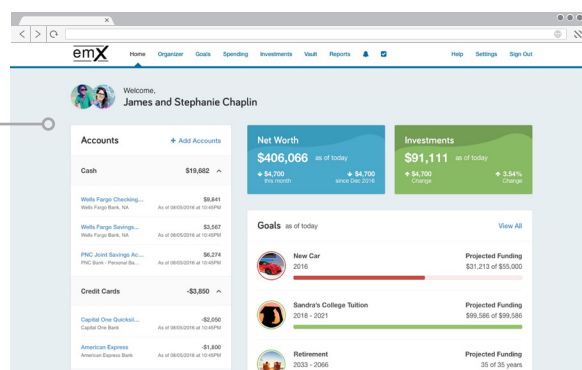
### Personalize your website

Customize your website by adding photos of what your wealth represents—the people and things most important in your life.

## STEP 5

### See your finances come to life

Easily organize and track your financial goals with spending and budgeting tools, investment monitoring, and more.



Now you're ready to start managing your wealth with your personal financial website!

By combining our personal digital experience with the professional guidance only a trusted advisor can provide, we can work together to build and monitor a financial plan that fits your needs.