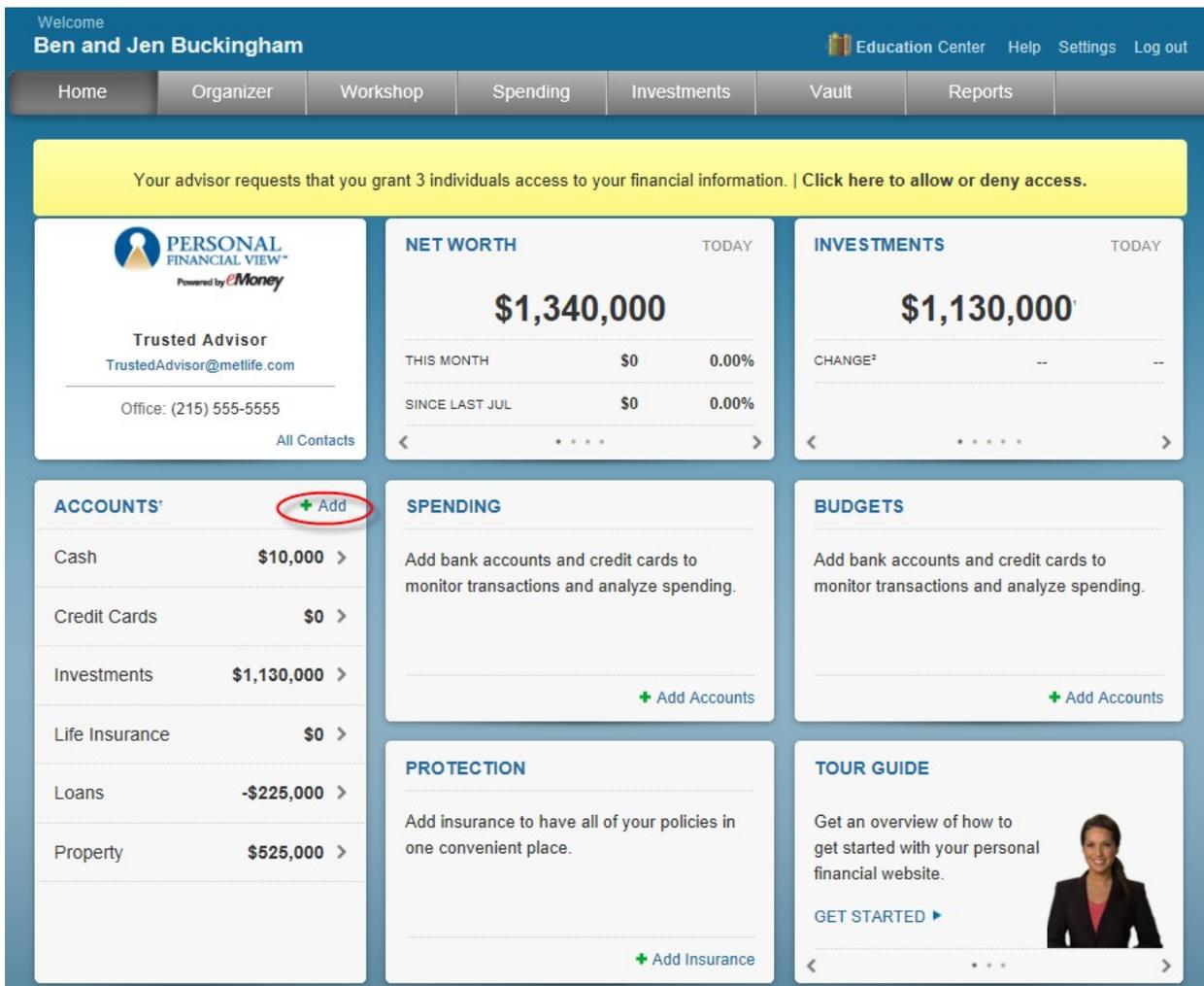


This booklet is designed to assist with setting up connections in your Personal Financial View® website.

1. Click on **Add** in the **Accounts** section under the **Home** page.



Welcome
Ben and Jen Buckingham

Education Center Help Settings Log out

Home Organizer Workshop Spending Investments Vault Reports

Your advisor requests that you grant 3 individuals access to your financial information. | [Click here to allow or deny access.](#)

PERSONAL FINANCIAL VIEW®
Powered by *eMoney*

Trusted Advisor
TrustedAdvisor@metlife.com
Office: (215) 555-5555
[All Contacts](#)

NET WORTH TODAY
\$1,340,000
THIS MONTH \$0 0.00%
SINCE LAST JUL \$0 0.00%

INVESTMENTS TODAY
\$1,130,000
CHANGE² -- --

ACCOUNTS¹ **+ Add**

Cash	\$10,000 >
Credit Cards	\$0 >
Investments	\$1,130,000 >
Life Insurance	\$0 >
Loans	-\$225,000 >
Property	\$525,000 >

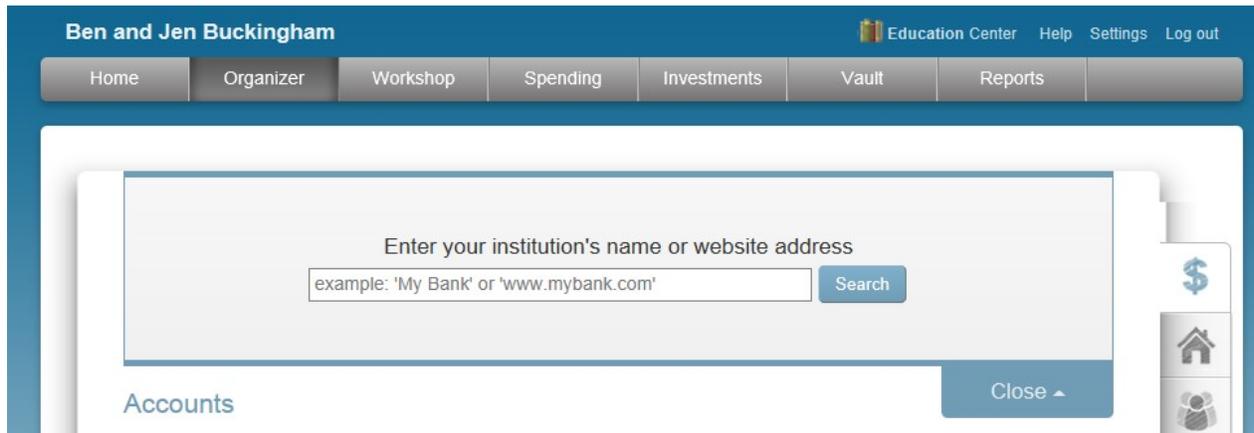
SPENDING
Add bank accounts and credit cards to monitor transactions and analyze spending.
[+ Add Accounts](#)

BUDGETS
Add bank accounts and credit cards to monitor transactions and analyze spending.
[+ Add Accounts](#)

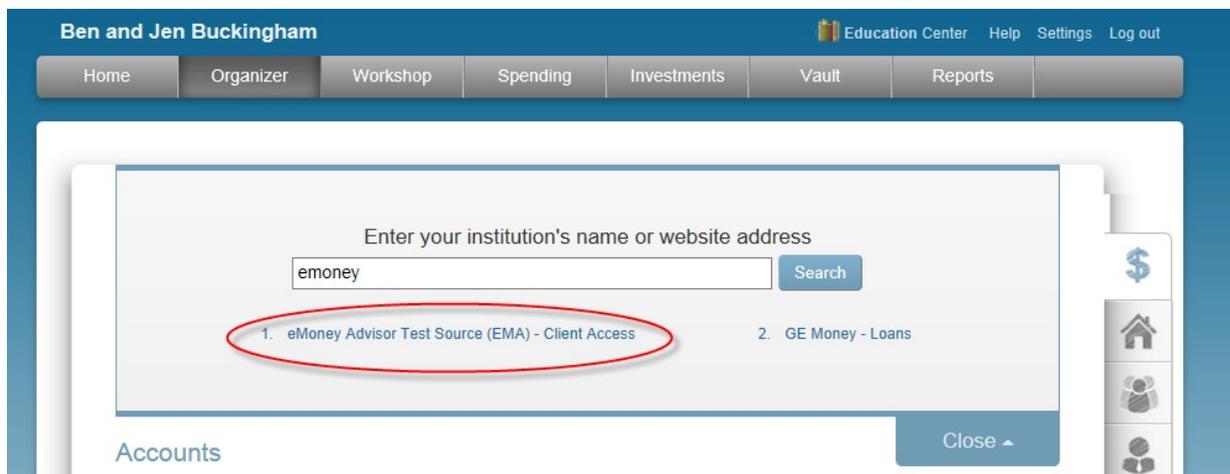
PROTECTION
Add insurance to have all of your policies in one convenient place.
[+ Add Insurance](#)

TOUR GUIDE
Get an overview of how to get started with your personal financial website.
[GET STARTED ▶](#)

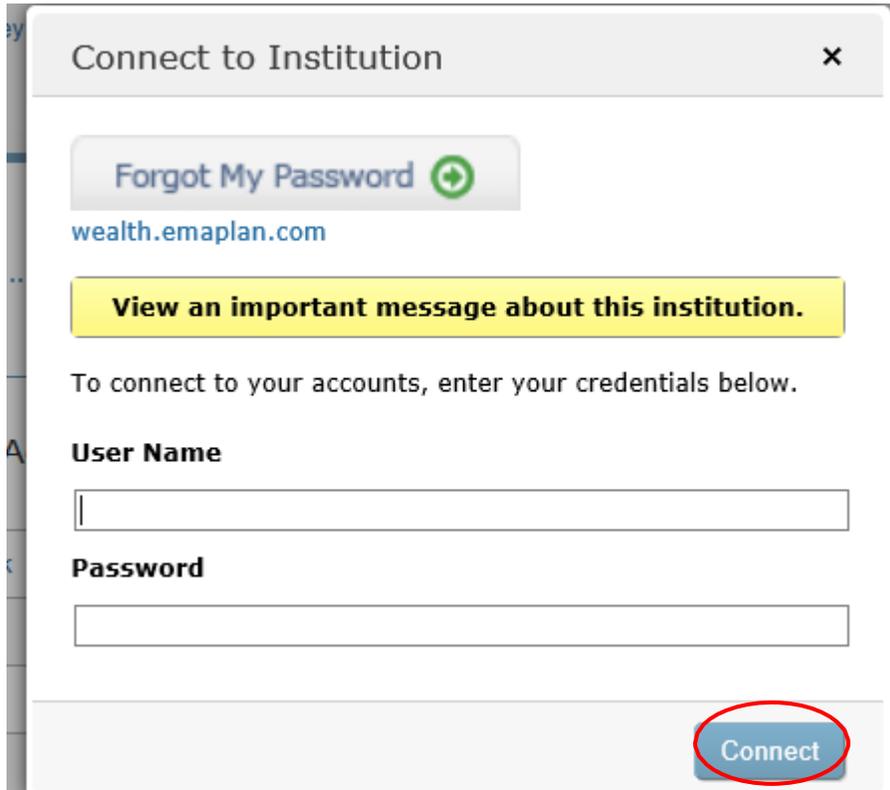
2. Enter in your institution and click **Search**.



3. From the list, select your institution.



4. Enter your **credentials** and click **Connect**.



Connect to Institution ✕

[Forgot My Password](#) 

wealth.emaplan.com

View an important message about this institution.

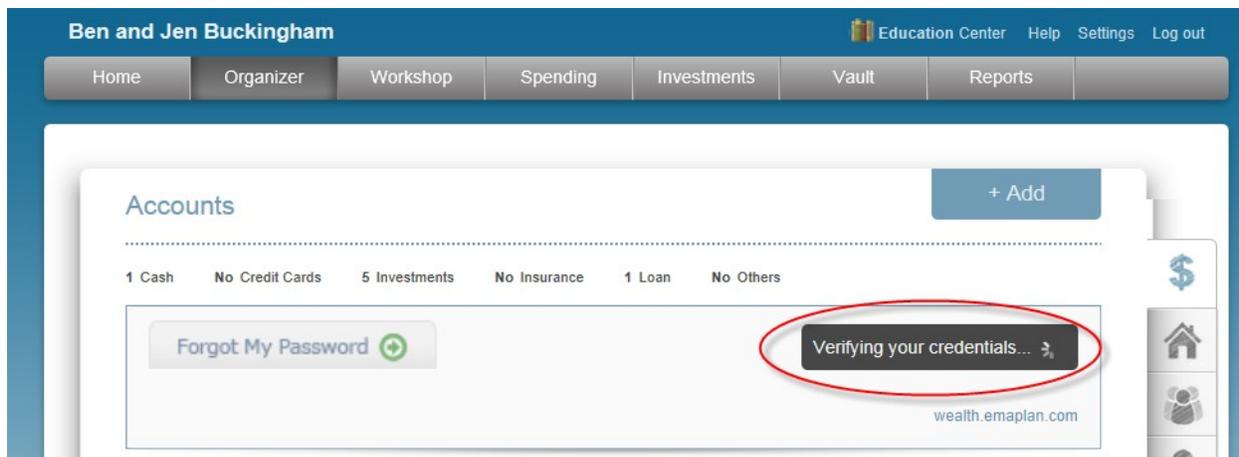
To connect to your accounts, enter your credentials below.

User Name

Password

Connect

NOTE: The system will take a moment to verify and retrieve your information.



Ben and Jen Buckingham Education Center Help Settings Log out

Home Organizer Workshop Spending Investments Vault Reports

Accounts + Add

1 Cash No Credit Cards 5 Investments No Insurance 1 Loan No Others

[Forgot My Password](#) 

Verifying your credentials... 

wealth.emaplan.com

5. The account values are pulled through onto the accounts page.

 Blue Credit Card	Loan - Credit Card	07/30/2013 01:58PM	-\$2,368
 Disability Policy	Disability Policy - Group Short Term	07/30/2013 01:58PM	\$0
 Easy 123 Checking	Cash Equivalent - Checking	07/30/2013 01:58PM	\$4,568
 Electric Orange	Cash Equivalent - Checking	07/30/2013 01:58PM	\$3,000
 Fidelity 401(k)	Qualified Retirement - Traditional...	07/30/2013 01:58PM	\$40,249
 Fidelity Brokerage	Taxable Investment	07/30/2013 01:58PM	\$62,684

6. To maintain the connection, see options in the upper right corner.

Accounts

+ Add

5 Cash 6 Credit Cards 9 Investments 18 Insurance 4 Loans 2 Others

