

In this guide we will walk you through the features of your client site organizer. Use the Organizer to group all of your financial information in one place. Click the different sections to add and edit the related information. The information included here will be used to populate other areas of the application, including the Home page.

1. To access the organizer, click the **Organizer** tab from the features bar.

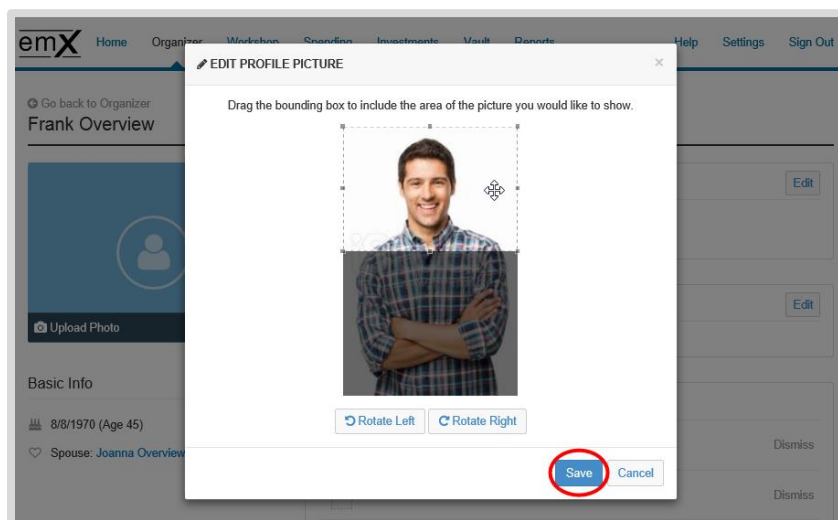
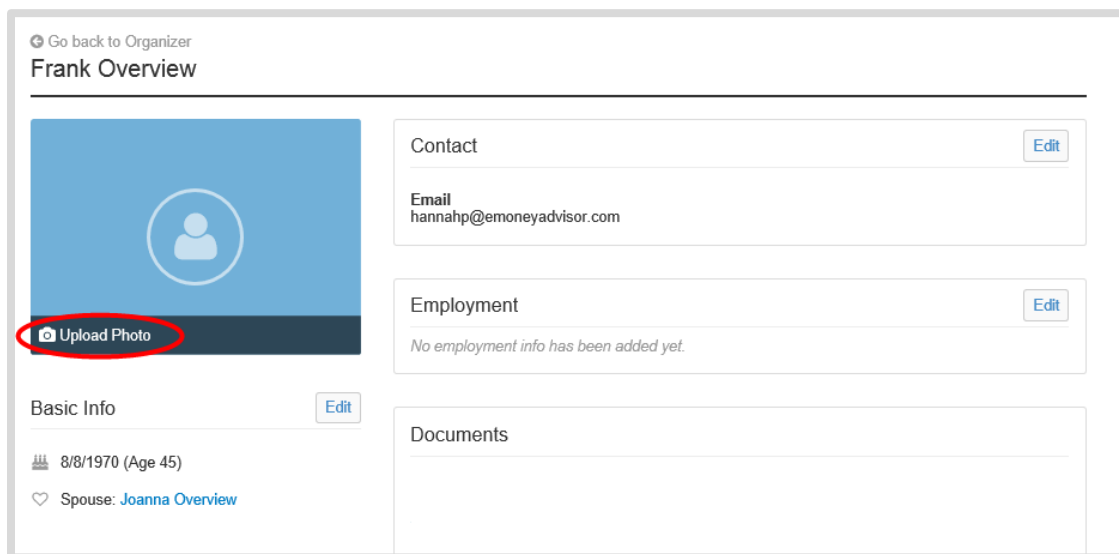
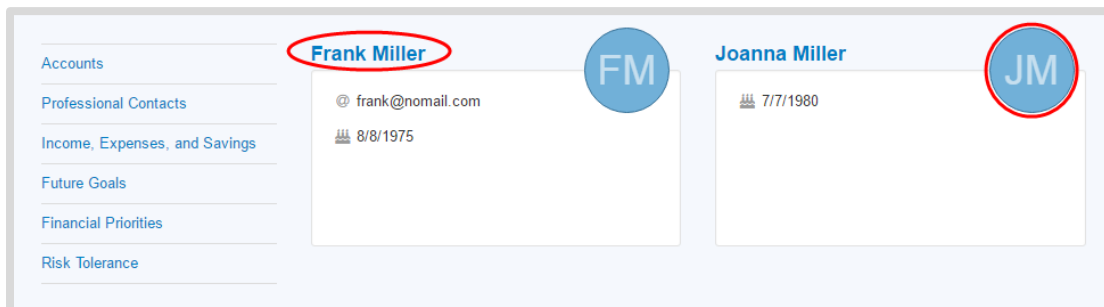
The screenshot shows the eMoney Advisor Organizer interface. The top navigation bar includes 'Home', 'Organizer' (highlighted with a red circle), 'Spending', 'Investments', 'Vault', 'Reports', 'Help', 'Settings', and 'Sign Out'. The main content area is divided into several sections:

- Client Profile:** eMoney Advisor logo, Hannah Pou, hannahp@emoneyadvisor.com, Office: (888) 362-8482, All Contacts.
- NET WORTH (TODAY):** \$1,890,928. THIS MONTH: -\$2,469 (-0.13%). YEAR TO DATE: +\$129,227 (+7.34%).
- INVESTMENTS (TODAY):** \$1,124,258. CHANGE²: \$0.00 (0.00%).
- ACCOUNTS[†] (+ Add):**
 - Cash: \$34,365 >
 - Credit Cards: -\$3,643 >
 - Investments: \$1,124,259 >
 - Life Insurance: \$35,500 >
 - Loans: -\$426,385 >
 - Property: \$1,295,000 >
- SPENDING:** Spending is not available for Sample Clients.
- BUDGETS:** Spending is not available for Sample Clients.
- PROTECTION:**
 - Whole Life Guardian: Frank Miller \$500,000
 - Term Life Guardian: Frank Miller \$800,000
 - Term Life Met Life: Joanna Miller \$500,000
- MOBILE:** Your complete financial picture now accessible from any smart phone. LEARN MORE ►

2. The organizer allows you to group all of your financial information in one place as seen below.

The screenshot displays the 'Organizer Overview' interface. At the top left is a navigation menu with items: Accounts, Professional Contacts, Income, Expenses, and Savings, Future Goals, Financial Priorities, and Risk Tolerance. The main area is divided into two columns for 'Frank Miller' (FM) and 'Joanna Miller' (JM). Each column contains 'Add Phone', 'Add Email', and 'Add Employment' options. Below this is a 'People' section with five profile cards for Peter (PM), Mary Beth (MM), Lucas (LM), Elaine (EG), and Stephanie (SM). An 'Add Person' button is circled in red. Below the 'People' section is a 'Property' section with four cards: 'Cars' (diamond icon), 'Home' (house icon), 'Jewelry' (diamond icon), and 'Vacation Mountain Home' (house icon). An 'Add Property' button is also circled in red.


- To modify any of your personal information or upload a profile picture to the site, click your name. To upload a picture, click **Upload a Photo** and search directly from the computer's desktop.



4. After clicking into your profile, you and your spouse can edit Basic Info, Contact and Employment Info and also upload relevant documents to your online vault.

[Go back to Organizer](#)

Frank Overview




Contact [Edit](#)


Email
hannahp@emoneyadvisor.com

Employment [Edit](#)

No employment info has been added yet.

Basic Info [Edit](#)

 8/8/1970 (Age 45)

 Spouse: [Joanna Overview](#)

Documents

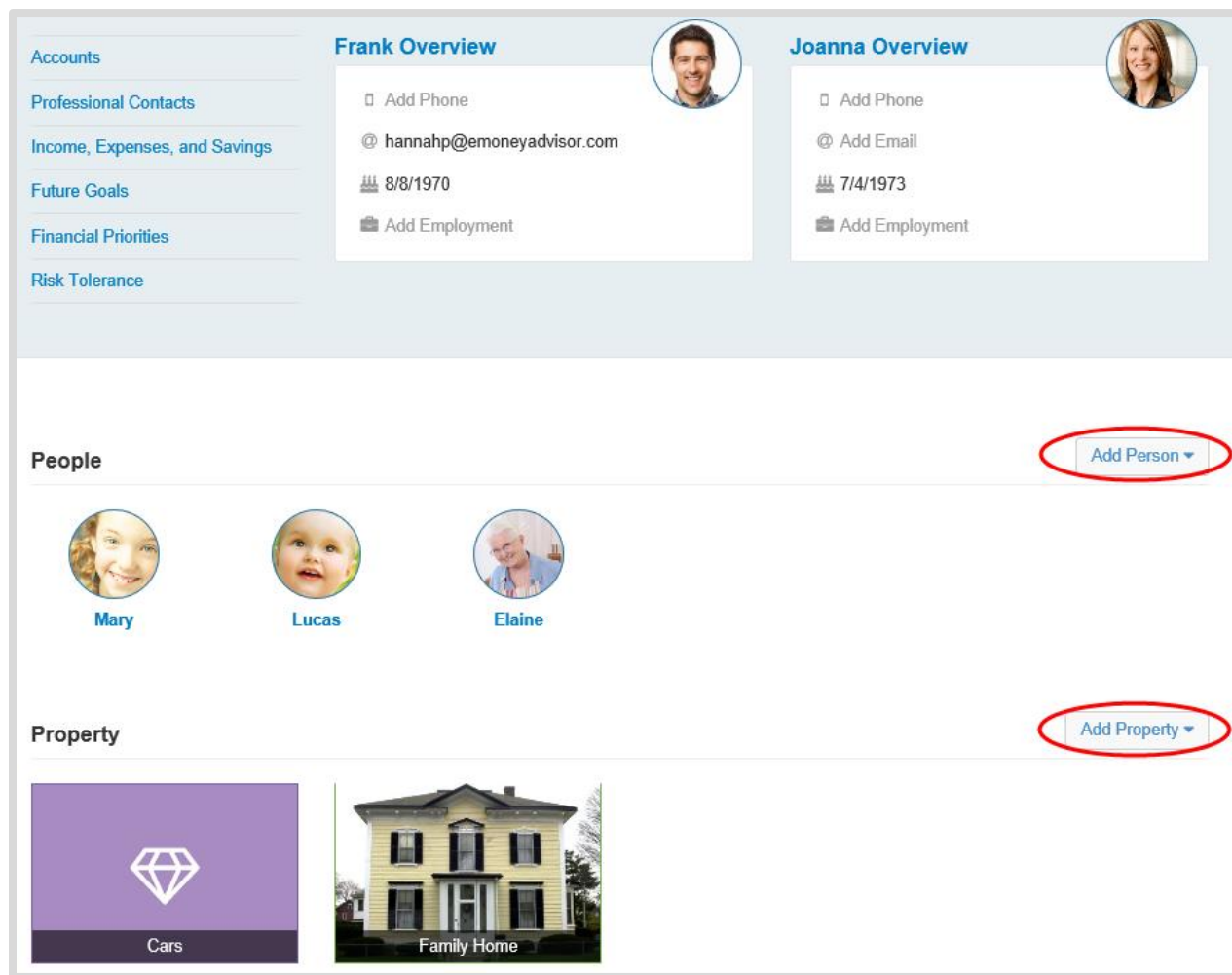
Please Note:

Basic Info: First & Last name, DOB, Gender, Special Needs, In Good Health, and Marital Status

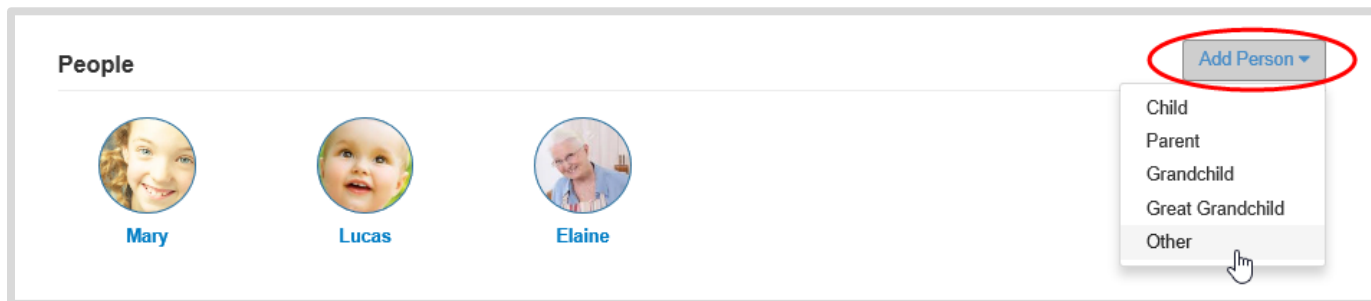
Contact Info: Email, Phone, Mobile Phone, Fax, and Full Address. Note that only the Mobile Phone number is what will display on the organizer overview.

Employment Info: Employer Name, Job Title, Email

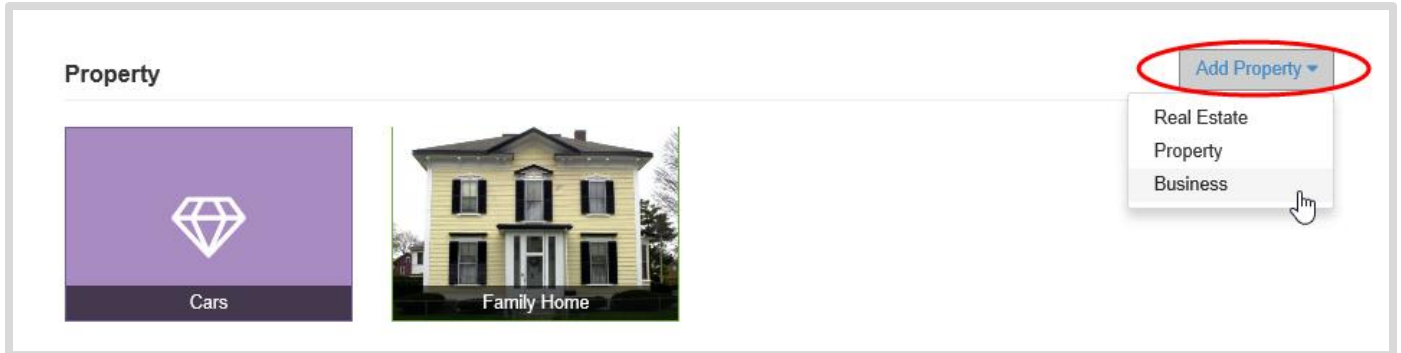
5. On the organizer main tab, you will also be able to add relevant **People** and **Property**.



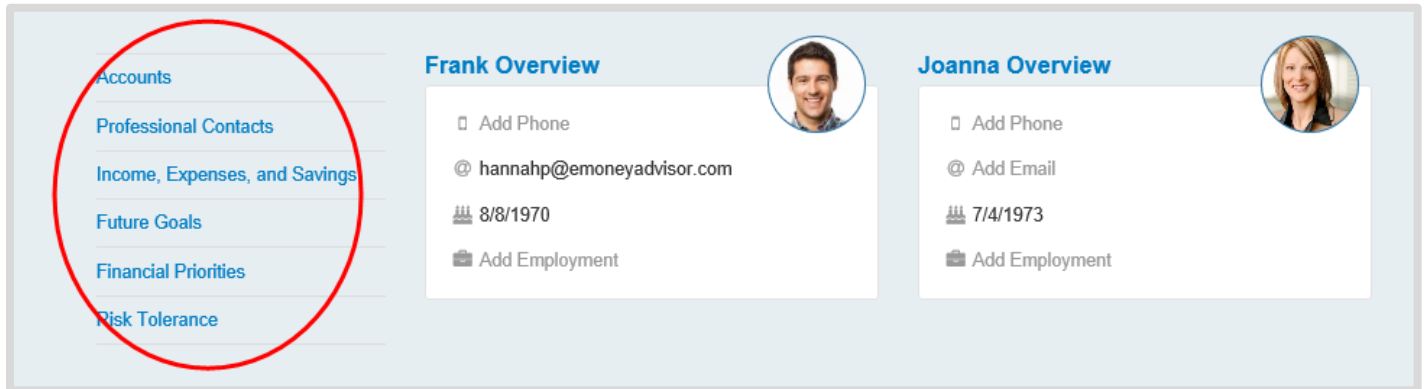
6. To add a person, click **Add Person** and choose what to add & enter details. You can upload a picture of each person on their individual page.



7. To add property, click **Add Property** and select Real Estate, Property, or Business.



8. The menu options on the upper left side of the organizer tab lists out the available sections the client can view and/or modify. Click an item to view its details. Click **Add** to add information within a section, and click **Save** to save the changes.



Please Note:

Accounts: allows you to add your online accounts directly from an institution or to add them manually. Click the Add button at the top of the page to enter your institution's name or to select the icons to add insurance policies and other accounts that are not connected to your institutions.

Professional Contacts: allows you to add information about any relevant contacts. Your Advisor will always be listed first in this section. Click Add, and then add contact information.

Income, Expenses, and Savings: contains your annual income, living expenses, and savings and contributions.

Future Goals: allows you to enter in an assumed age of retirement, view existing or add education goals, and any existing or new major expenses.

Financial Priorities: used to assign an order to your financial goals. Client and Spouse can prioritize their goals.

Risk Tolerance: used to define how much risk you are willing to accept. You can make changes to their answers at any time.

9. The organizer allows you to add any relevant documents to an entry by utilizing the **Documents** feature within certain organizer entries. You can either upload a document from your desktop, or tie an existing vault document to the entry. Anything uploaded through documents will automatically be added to your Shared Documents folder in the vault. Below screen shot is an example of the Documents section of a Taxable Investment.

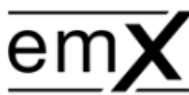
The screenshot displays the 'Taxable Investment' organizer interface. At the top left, there is a link 'Go back to Accounts'. The main title is 'Taxable Investment'. Below this, there is a form with the following fields: 'Asset Name' (Taxable Investment), 'Institution Name' (empty), 'Owner' (Frank and Joanna (Joint/ROS) with an '+ Add' button), 'Total Value' (\$85,000), 'Holdings Value' (empty), 'Cash Balance' (empty), 'Margin Balance' (empty), and 'Tax Basis' (empty). On the right side, there is a 'View Holdings' button and a 'View' section with links for 'Investment Summary', 'Asset Allocation', 'Investment Transactions', and 'Delete this Account'. At the bottom right of the form are 'Save' and 'Cancel' buttons. Below the form is a 'Documents' section, which is circled in red. It contains an 'Add Other' button with a green plus icon and a dropdown arrow. Below this button is a link 'View dismissed suggestions'.

10. Professional Contacts allows you to add information on key contacts. Your advisor will always be listed first in this section.

Go back to Organizer





Professional Contacts

Add



eMoneyAdvisor, LLC
1001 E. Hector Street, Suite 401
Conshohocken, PA 19428

Hannah Pou
hannahp@emoneyadvisor.com
Office: (888) 362-8482
[Contact Me](#)

Contact Name	Role	Email	Phone	
 Ben Alliance	Alliance Partner	hannahp@emoneyadvisor.com	(888) 362-8482	
 Joe Murphy	CPA	joemurphy@nomail.com	(888) 362-8482	

11. Income, Expenses, and Savings will contain your annual income, living expenses, and savings & contributions.

Income, Expenses, and Savings

Annual Income [Add](#)

Income	Value
Frank's Salary	\$90,000 ✕
Joanna's Salary	\$65,000 ✕

Annual Living Expenses [Add Itemized](#)

Annual Living Expenses	\$65,000
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12. Future Goals allows you to add retirement goals, education goals, and any major expense goals. Click Add to create a new goal.

Future Goals

Retirement

Frank's retirement age	<input type="text" value="62"/>
Joanna's retirement age	<input type="text" value="65"/>

Education Expenses [Add](#)

Lucas College	\$37,318 ✕
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Major Expenses [Add](#)

Addition to House	\$80,000 ✕
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13. Financial Priorities are used to help create an accurate view of your plans regarding your finances. Here you can assign an order to their financial goals.

Financial Priorities

Establishing goals can help lay the path for getting where you want to be. Prioritize what matters most to you. Don't worry, you can reorganize your priorities if they change over time.

Frank	Joanna
<div style="text-align: right; margin-bottom: 5px;">Change</div> <div style="margin-bottom: 10px;"> Saving for College 1 </div> <div style="margin-bottom: 10px;"> Planning for Retirement 2 </div> <div style="margin-bottom: 10px;"> Managing a Budget 3 </div> <div style="margin-bottom: 10px;"> Providing a Legacy 4 </div> <div style="margin-bottom: 10px; border: 1px dashed #ccc; height: 30px; display: flex; align-items: center; justify-content: center;">5</div> <div style="border: 1px dashed #ccc; height: 30px; display: flex; align-items: center; justify-content: center;">6</div>	<div style="text-align: right; margin-bottom: 5px;">Change</div> <div style="margin-bottom: 10px;"> Insuring Your Life 1 </div> <div style="margin-bottom: 10px;"> Creating Retirement Income 2 </div> <div style="margin-bottom: 10px;"> Saving for College 3 </div> <div style="margin-bottom: 10px;"> Contributing to Charity 4 </div> <div style="margin-bottom: 10px;"> Providing a Legacy 5 </div> <div style="margin-bottom: 10px;"> Saving for Major Purchases 6 </div>

14. Risk Tolerance provides a 12 question questionnaire. You will need to answer all 12 questions in full to see your risk score.

