eMoney User Guide

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Logging On

Step 1

1. Enter the following link for client access:
   https://wealth.emaplan.com/ema/lpl/mardincapital

2. Enter User Name.

3. Enter temporary password.

4. Click Login.

Initial Password Change

1. Enter the old (temporary) password.

2. Enter new password.
   - Must be at least 8 characters.
   - Must have at least 1 number.
   - Must have at least 1 UPPERCASE letter.

   Example: Horse1race

3. Verify new password.

4. Enter Email address.

5. Select a secret question.

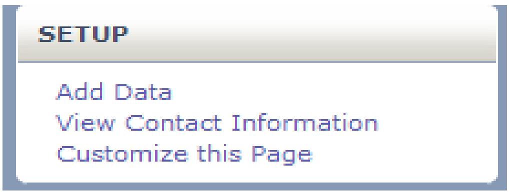
6. Type the answer to your secret question.
   - Must be at least four characters.

7. Verify your secret question answer.

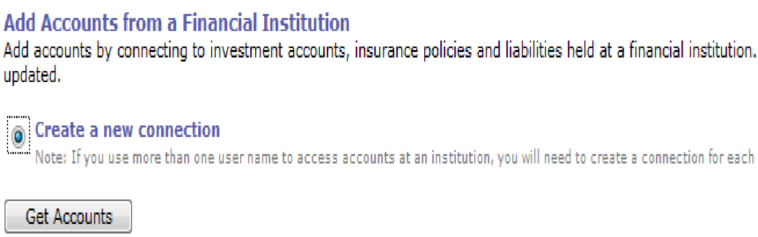
8. Click “Submit.”

Step 2

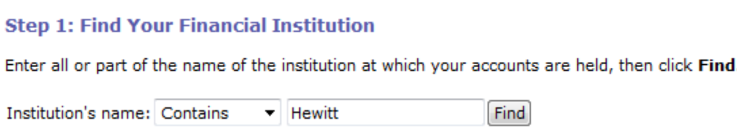
1. On the Welcome Screen, click "Add Data" under the Setup tab.



2. Select "Create a New Connection" then click "Get Accounts."



3. Find your Financial Institution.

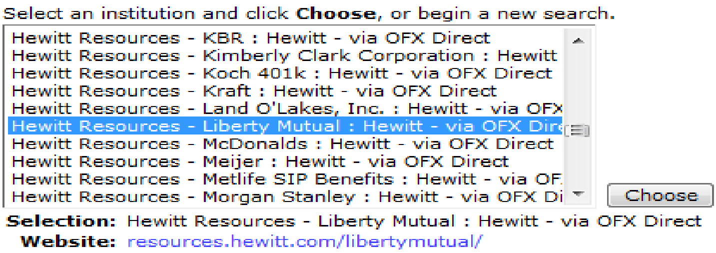


4. Click on "Find."

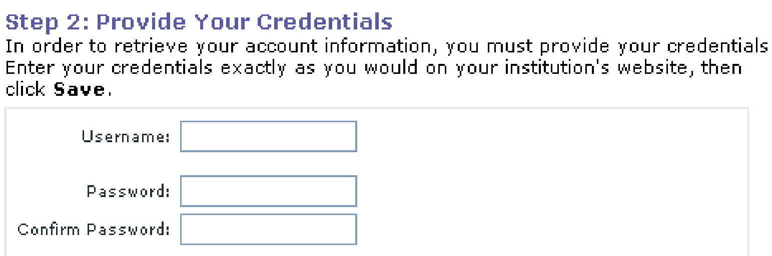
5. Highlight the correct Financial Institution and check the website address at the bottom of the page.

Set up Aggregation

6. Click on "Choose."



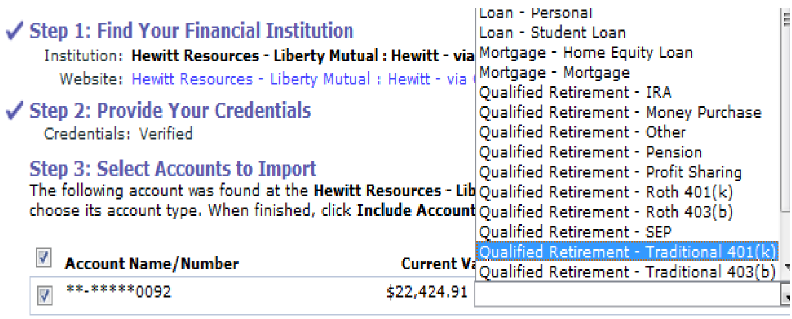
7. Enter your credentials.



8. Choose "Yes" to allow your Advisor to manage this connection.

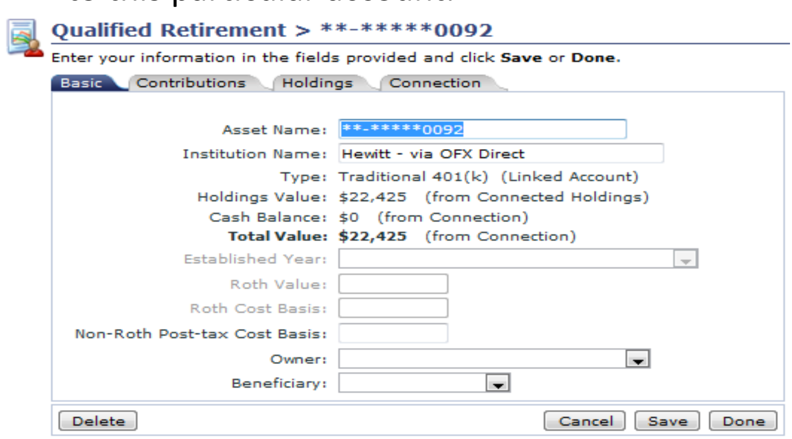
9. Click on "Save."

10. Select the Account Name and Account Type from the drop-down menu.



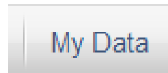
11. Click on "Include Accounts."

12. Your accounts will now be linked and automatically updated every night. Click on "Review Data" to make any necessary changes to this particular account.



Updating Your Personal Data

Step 3



1. Click on "My Data" tab.

2. Click on each Personal Data link and review the information.

   -Make notes of any changes or additions.