

# ***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>



To logon, enter your User Name and Password and click the Logon button.

User Name:

Password:

Enable Additional Security: ☒



2. Enter User Name.
3. Enter temporary password.
4. Click Login.

## Initial Password Change

The screenshot shows the 'Initial Password Change' form for the Mardin Capital Group Wealth Management System. The form includes fields for User Name (pre-filled with 'MardinCapitalSample'), New Password, Verify New Password, Secret Question (a dropdown menu), Secret Answer, and Verify Secret Answer. A 'Submit' button is at the bottom of the form. Below the form is a 'Back to Logon' button. The page also features logos for McAfee SECURE, VeriSign Trusted, and eMoney Advisor.

**MARDIN**  
CAPITAL GROUP  
LLC  
INTELLIGENT  
WEALTH MANAGEMENT

*Wealth Management System*

You are required to change your password the first time you logon. Please enter a new password, and provide us with a secret question that we can use to help you in case you forget your password.

User Name: MardinCapitalSample

New Password:

Verify New Password:

Secret Question:

Secret Answer:

Verify Secret Answer:

TESTED DAILY 14-JULY

VERIFIED

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.

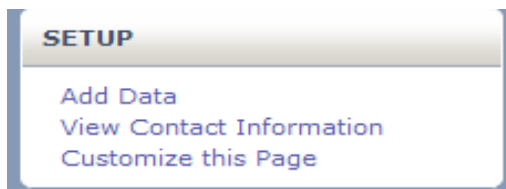
*Example: Horse1race*
3. Verify new password.
4. Enter Email address.
5. Select a secret question.
6. Type the answer to your secret question.
  - Must be at least four characters.
7. Verify your secret question answer.
8. Click "Submit."

## Set up Aggregation

### Step 2

Welcome

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



2. Select “Create a New Connection” then click “Get Accounts.”

#### Add Accounts from a Financial Institution

Add accounts by connecting to investment accounts, insurance policies and liabilities held at a financial institution. updated.



#### Create a new connection

Note: If you use more than one user name to access accounts at an institution, you will need to create a connection for each

Get Accounts

3. Find your Financial Institution.

#### Step 1: Find Your Financial Institution

Enter all or part of the name of the institution at which your accounts are held, then click **Find**.

Institution's name:

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.”

Select an institution and click **Choose**, or begin a new search.

Hewitt Resources - KBR : Hewitt - via OFX Direct	
Hewitt Resources - Kimberly Clark Corporation : Hewitt	
Hewitt Resources - Koch 401k : Hewitt - via OFX Direct	
Hewitt Resources - Kraft : Hewitt - via OFX Direct	
Hewitt Resources - Land O'Lakes, Inc. : Hewitt - via OFX	
Hewitt Resources - Liberty Mutual : Hewitt - via OFX Direct	
Hewitt Resources - McDonalds : Hewitt - via OFX Direct	
Hewitt Resources - Meijer : Hewitt - via OFX Direct	
Hewitt Resources - Metlife SIP Benefits : Hewitt - via OF	
Hewitt Resources - Morgan Stanley : Hewitt - via OFX Di	

**Selection:** Hewitt Resources - Liberty Mutual : Hewitt - via OFX Direct  
**Website:** [resources.hewitt.com/libertymutual/](https://resources.hewitt.com/libertymutual/)

### 7. Enter your credentials.

#### Step 2: Provide Your Credentials

In order to retrieve your account information, you must provide your credentials. Enter your credentials exactly as you would on your institution's website, then click **Save**.

Username:	<input type="text"/>
Password:	<input type="password"/>
Confirm Password:	<input type="password"/>

### 8. Choose “Yes” to allow your Advisor to manage this connection.

Allow your Advisor to manage this Connection?	<input type="button" value="Yes"/>	<input type="button" value="Save"/>
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### 9. Click on “Save.”

## Set up Aggregation

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

✓ **Step 1: Find Your Financial Institution**  
Institution: **Hewitt Resources - Liberty Mutual : Hewitt - via**  
Website: **Hewitt Resources - Liberty Mutual : Hewitt - via**

✓ **Step 2: Provide Your Credentials**  
Credentials: Verified


**Step 3: Select Accounts to Import**  
The following account was found at the **Hewitt Resources - Lib**  
choose its account type. When finished, click **Include Account**

<input checked="" type="checkbox"/> Account Name/Number	Current V	
<input checked="" type="checkbox"/> ***-*****0092	\$22,424.91	<div>Loan - Personal Loan - Student Loan Mortgage - Home Equity Loan Mortgage - Mortgage Qualified Retirement - IRA Qualified Retirement - Money Purchase Qualified Retirement - Other Qualified Retirement - Pension Qualified Retirement - Profit Sharing Qualified Retirement - Roth 401(k) Qualified Retirement - Roth 403(b) Qualified Retirement - SEP Qualified Retirement - Traditional 401(k) Qualified Retirement - Traditional 403(b)</div>

11. Click on “Include Accounts.”

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.

 **Qualified Retirement > \*\*\*-\*\*\*\*\*0092**

Enter your information in the fields provided and click **Save** or **Done**.

**Basic** Contributions Holdings Connection

Asset Name: **\*\*\*-\*\*\*\*\*0092**

Institution Name: **Hewitt - via OFX Direct**

Type: **Traditional 401(k) (Linked Account)**

Holdings Value: **\$22,425 (from Connected Holdings)**

Cash Balance: **\$0 (from Connection)**

**Total Value: \$22,425 (from Connection)**

Established Year:

Roth Value:

Roth Cost Basis:

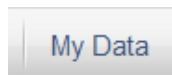
Non-Roth Post-tax Cost Basis:

Owner:

Beneficiary:

## ***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.

#### **My Personal Data**

-  Overview
  - Family Information
  - Cash and Investments
  - Savings and Transfer Plans
  - Stock Options
  - Real Estate
  - Personal Property
  - Business
  - Expenses
  - Mortgages and Loans
  - Insurance
  - Income Sources
  - Assumptions
  - Advanced Items