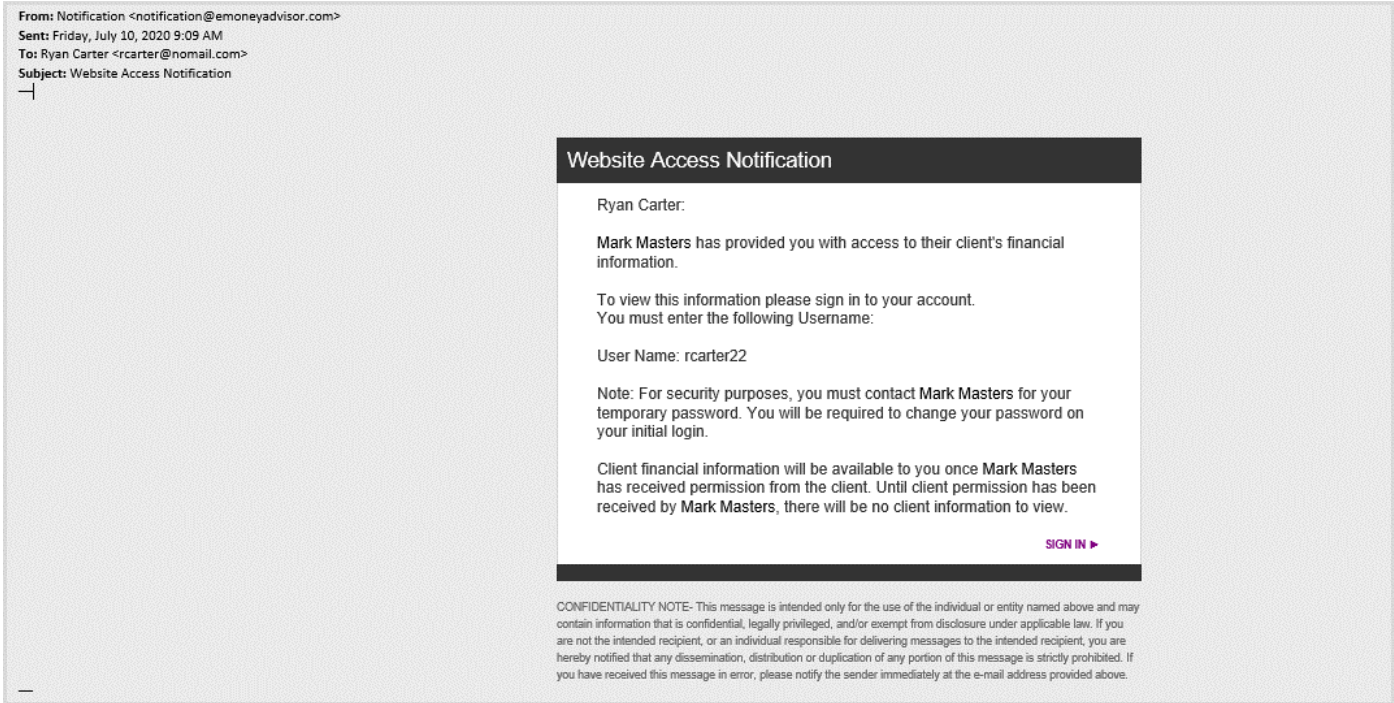


Alliance Partner Access

Alliance Partners are individuals that do not have their own eMoney license, however, an eMoney Advisor may still want to share Client information with them. Note that Alliance Partners will have read only access, but they can be granted permission to upload documents to the Vault.

Email Notification

The Alliance Partner will receive an email notification that they now have access to the application.

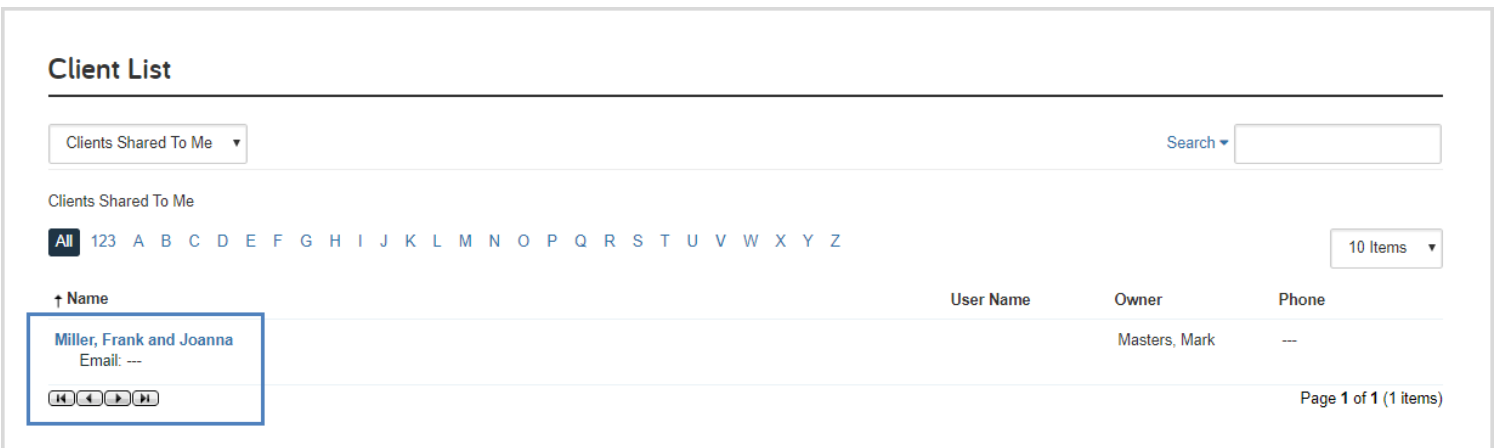


Setting the Password and Security Questions

Upon initial login, the Alliance Partner will need to reset their password and set 3 security questions.

Viewing Clients

The Alliance Partner will see a list of Clients that the Advisor has permitted them to view.



Alliance Partner Access

View Limitations

After selecting a Client, the Alliance Partner will see links to the Client Dashboard, Reports, and the Vault depending on the access the Advisor has given them. Clicking on any of these will take the Alliance Partner to that content.

Client Information

Frank and Joanna Miller

Access Client Information

Click the links below to access Frank and Joanna Miller's personal financial data.

You can review Frank and Joanna Miller's financial status and provide input during the planning process through collaboration with the financial advisor.

You can view...

Client Dashboard
Review Frank and Joanna Miller's financial overview.

Reports
Review Frank and Joanna Miller's financial reports.

Vault
Review Frank and Joanna Miller's financial documents. You have been granted Full Access to Frank and Joanna Miller's Vault.

Client Dashboard

The Alliance Partner sees a Client Dashboard view rather than the Advisor's Client Overview.

Client

Frank and Joanna Miller

Primary Advisor

Mark Masters
Four Radnor Corporate Center
Radnor, PA 19087
Work: (937) 855-1212
mmasters@nomail.com

Asset Allocation

Invalid ChartX License 2100000

- Large Growth (19.15%) Large Value (5.81%)
- Large Blend (12.79%) Mid Value (8.73%)
- Mid Blend (3.36%) Small Growth (4.18%)
- Small Value (5.13%) Small Blend (4.51%)
- International (3.03%) Emerging Mkts (8.08%)
- Div. Int. Mun. (1.98%) Int. Int. Mun. (1.98%)
- Long-Term Mun. (1.98%) Inv. Glob. Bond (13.29%)
- Div. Int. Bond (2.05%) Cash (2.77%)
- Unclassified (2.15%)

Investments

Plan Assets	Estimated Value
529 Plan for Lucas	\$0
529 Plan for Mary Beth	\$0
Cash / Emergency Fund	\$25,000
Frank and Joanna Joint Investments	\$267,888
Frank's 401(k)	\$441,836
Joanna's 403B	\$143,509
Joanna's Roth IRA (converted)	\$103,431
QLAC - Frank	\$0
Taxable Investment - Frank	\$20,000
Taxable Investment - Frank	\$20,000
Whole Life Policy on Frank	\$35,500
Total:	\$1,058,384

Please refer to the Disclosure for additional information on Aggregation Services.

Top Holdings

	Est. Units	Est. Value
MSFT Microsoft Corporation	457	\$97,944
AAPL Apple Inc.	114	\$43,831
MIDD Midstate Corporation	339	\$24,049
DIS Walt Disney Company	178	\$20,792
CSCO Cisco Systems, Inc.	268	\$12,049

as of 7/9/2020 4:00 PM

Asset Groups

	Estimated Value
Personal Assets	\$1,058,384
Non-Qualified Assets	\$332,088
Retirement Assets	\$688,776
Taxable Assets	\$307,088
Cash Assets	\$25,000
Stock Options / Grants	\$0
Qualified Retirement Assets	\$585,345
Roth Assets	\$103,431
Health Savings Accounts	\$0
529 Assets	\$0
Annuity Assets	\$0
Deferred Compensation Assets	\$0
Insurance Assets	\$35,500
Non-Insurance Assets	\$1,020,884
Entity Assets	\$0
Assets Under Management	\$302,588
Assets Not Under Management	\$753,776

Financial Snapshot

Assets ²	
Taxable Investments	\$307,088
Retirement Investments	\$688,776
Cash and Equivalents	\$25,000
Real Estate	\$1,200,000
Life Insurance	\$35,500
Personal Property	\$65,000
Total	\$2,351,364
Liabilities	
Mortgages	(\$428,385)
Other	(\$3,843)
Total	(\$430,028)
Total Net Worth:	\$1,921,336

Alliance Partner Access

Reports

The Alliance Partner will be able to select from a list of Client Reports that the Advisor has given them access to.

Report: Account Information

- Account Information
- Assets
- Balance Sheet
- Cash Flow
- Education Planning
- Estate Calculations
- Estate Liquidity
- Estate Transfer
- Expense Planning
- Fact Summary
- Flow Charts
- Income Tax
- Investments
- Life Insurance
- Net Worth
- Objectives
- Protection
- Statements
- Stock Options / Grants

Positions As Of	Data Entry Method	Sold, Serviced, or Solicited by Your Financial Representative's Firm
1/4/2018 11:40 AM	Manually Entered	No
10/22/2018 12:00 AM	Manually Entered	No
7/9/2020 4:00 PM	Manually Entered	Yes
1/4/2018 11:42 AM	Manually Entered	No
1/4/2018 11:46 AM	Manually Entered	No
1/4/2018 11:48 AM	Manually Entered	No
10/22/2018 12:00 AM	Manually Entered	No
2/5/2020 4:29 PM	Manually Entered	No
2/4/2020 2:06 PM	Manually Entered	No
1/4/2018 12:21 PM	Manually Entered	Yes

Vault

The Alliance Partner has access to Vault content set by the Advisor and can upload documents, if given permission.

Vault

New Folder Upload

Files

search by name Search

Name	Size	Shared	Created
Taxes	0 Files	Shared	2/14/2020 at 9:23 am

Usage: 911.38 KB (0 B are private)

Navigation

Clicking the Client drop-down will allow the Alliance Partner to navigate to other content for this Client.

Home Advisor Info Client

- Access Client Information
- Client Dashboard
- Reports
- Vault