



KING wealth planning, inc.

Retirement is a Journey. Let us be your Guide.

This booklet is designed to assist with setting up connections in your personal planning website.

1. Click on the **Accounts** tab or **Add Accounts**.

Welcome
Fred Millionaire and Frita Millionaire Profile | Settings | Log out

Home **Accounts** Spending Investments Vault Reports

Wealth Management System

John Walters
johnw@emoneyadvisor.com
All Advisors

Net Worth Details
as of today

\$31,670,000

Assets **\$31,670,000**
Liabilities **\$0**

Investments Details
as of today

\$24,679,000¹

Today's Change²
-- --

Accounts¹ Add Accounts

Cash	\$25,000	▶
Credit Cards	\$0	▶
Investments	\$24,679,000	▶
Life Insurance	\$646,000	▶
Loans	\$0	▶
Property	\$6,500,000	▶

Spending

Adding bank accounts and credit cards to the system allows you to monitor transactions and analyze spending.

Add Accounts

Budget

Adding bank accounts and credit cards to the system allows you to monitor transactions and analyze spending.

Add Accounts

Protection

Variable Universal Life	\$1,000,000
eMoney - alpha/ema - Clie...	
Whole Life	Fred Millionaire \$1,000,000
Primary IBX	Family

[All Insurance Policies](#)

Vault

Store secure documents online for safe-keeping.

[Go to Vault](#)

¹ Accounts shown with this symbol were not noted as managed by your financial representative's firm. Please see the [Account Information and Sources](#) page for more information.
This analysis is not an official account statement and is provided for informational purposes as a courtesy to you. It may include assets that your financial representative's firm does not hold on your behalf and which are not included on the firm's books and records. Assets held outside your representative's firm may not be covered by SIPC.
Please refer to the [Terms of Service](#) for additional information on Aggregation Services.
For additional footnotes, definitions, and explanations about your accounts and investments, [click here](#).

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Software Version: 1.1.6



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2. Click **Add Accounts**.


Fred Millionaire and Frita Millionaire

Profile | Settings | Log out

HomeAccountsSpendingInvestmentsVaultReports


Add Accounts ▼

The items below have been manually added. Their values will not be automatically updated.




Real Estate & Property

Regular House	Real Estate - Residence	6/7/2010 11:35 AM	\$6,500,000
---------------	-------------------------	-------------------	-------------



Insurance Policies

Family Medical	Medical Policy - Primary	6/7/2010 11:36 AM	\$0
† Life Insurance	Life Insurance - Term Life	6/7/2010 11:36 AM	\$0



Other Accounts

† Mary 529	529 Plan	6/7/2010 11:39 AM	\$180,000
------------	----------	-------------------	-----------

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Your account information is retrieved using a variety of methods, each of which has its own level of accuracy and timeliness. Please see the [Account Information and Sources](#) page for more information.

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3. Type in the institution and click **Search**.

Fred Millionaire and Frita Millionaire

Profile | Settings | Log out

HomeAccountsSpendingInvestmentsVaultReports

Enter your institution's name or website address

example: 'My Bank' or 'www.mybank.com'

Search

Need to add real estate, property, or accounts you can't find online? You can add them manually:

Add Real Estate & Property

Add Insurance Policies

Add Other Accounts

Close

The items below have been manually added. Their values will not be automatically updated.

Real Estate & Property

Regular House	Real Estate - Residence	6/7/2010 11:35 AM	\$6,500,000
---------------	-------------------------	-------------------	-------------

Insurance Policies

Family Medical	Medical Policy - Primary	6/7/2010 11:36 AM	\$0
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Other Accounts

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Securities offered through LPL Financial, Member FINRA/SIPC • Financial planning offered through King Wealth Planning, Inc.



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4. From the list, select your institution.




Fred Millionaire and Frita Millionaire Profile | Settings | Log out

Home Accounts Spending Investments Vault Reports


Enter your institution's name or website address

1. eMoney - alpha/ema - Client Access
2. eMoney - localhost
3. eMoney Advisor Platform
4. eMoney Financial
5. GE Money - Loans
6. Group-Managed Test
7. Reliance Money


Need to add real estate, property, or accounts you can't find online? You can add them manually:

 Add Real Estate & Property  Add Insurance Policies  Add Other Accounts


The items below have been manually added. Their values will not be automatically updated.

 **Real Estate & Property**

Regular House	Real Estate - Residence	6/7/2010 11:35 AM	\$6,500,000
---------------	-------------------------	-------------------	-------------

 **Insurance Policies**

Family Medical	Medical Policy - Primary	6/7/2010 11:36 AM	\$0
† Life Insurance	Life Insurance - Term Life	6/7/2010 11:36 AM	\$0

 **Other Accounts**

† Mary 529	529 Plan	6/7/2010 11:39 AM	\$180,000
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5. Enter your **credentials** and click **Connect**.

Connect to Institution X

eMoney - alpha/ema -
Client Access
https://beta.emadev.com

Click to view an important message about this institution.

To connect to your accounts, enter your credentials below.

User Name
fredm4

Password
.....

Connect

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

Fred Millionaire and Frita Millionaire Profile | Settings | Log out

Home Accounts Spending Investments Vault Reports

Add Accounts

eMoney - alpha/ema - Client Access
https://beta.emadev.com
Click to view an important message about this institution.

Verifying your credentials...

The items below have been manually added. Their values will not be automatically updated.

Real Estate & Property

Regular House	Real Estate - Residence	6/7/2010 11:35 AM	\$6,500,000
---------------	-------------------------	-------------------	-------------

Insurance Policies

Family Medical	Medical Policy - Primary	6/7/2010 11:36 AM	\$0
* Life Insurance	Life Insurance - Term Life	6/7/2010 11:36 AM	\$0

Other Accounts

* Mary 529	529 Plan	6/7/2010 11:39 AM	\$180,000
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6. The account values are pulled through onto the accounts page.

Fred Millionaire and Frita MillionaireProfile | Settings | Log out


HomeAccountsSpendingInvestmentsVaultReports

Add Accounts ▾


**eMoney - alpha/ema - Client Access**refresh | find accounts | settings | delete
<https://beta.emadev.com>
Click to view an important message about this institution.
Last updated 4 minutes ago

† checking	Taxable Investment	1/31/2012 1:58 PM	\$25,000
† Fred's IRA	Taxable Investment	1/31/2012 1:59 PM	\$423,000
† Frita's Taxable Brokerage	Taxable Investment	1/31/2012 2:00 PM	\$11,000,000
† New Fact	Life Insurance - Variable Unive...	1/31/2012 2:01 PM	\$323,000
† New Fact	Taxable Investment	1/31/2012 2:00 PM	\$689,000


The items below have been manually added. Their values will not be automatically updated.

**Real Estate & Property**

Regular House	Real Estate - Residence	6/7/2010 11:35 AM	\$6,500,000
---------------	-------------------------	-------------------	-------------

**Insurance Policies**

Family Medical	Medical Policy - Primary	6/7/2010 11:36 AM	\$0
† New Fact	Life Insurance - Whole Life	1/31/2012 2:01 PM	\$323,000

**Other Accounts**

† checking	Cash Equivalent - Checking	1/31/2012 1:58 PM	\$25,000
† Fred's IRA	Roth IRA	1/31/2012 1:59 PM	\$423,000
† Frita's Taxable Brokerage	Taxable Investment	1/31/2012 2:00 PM	\$11,000,000
† Mary 529	529 Plan	6/7/2010 11:39 AM	\$180,000
New Fact	Mortgage - Home Equity Loan	1/31/2012 12:00 AM	\$0
† New Fact	Qualified Retirement - Traditio...	1/31/2012 2:00 PM	\$689,000
† Variable Annuity	Annuity - Variable	1/31/2012 1:58 PM	\$250,000



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

Fred Millionaire and Frita Millionaire

Profile | Settings | Log out

Home

Accounts

Spending

Investments

Vault

Reports

Enter your institution's name or website address

example: 'My Bank' or 'www.mybank.com'

Search

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Add Real Estate & Property

Add Insurance Policies

Add Other Accounts

Close

eMoney - alpha/ema - Client Access

<https://beta.emadev.com>

refresh | find accounts | settings | delete

Last updated 30 minutes ago

Click to view an important message about this institution.

† checking	Taxable Investment	1/31/2012 1:58 PM	\$25,000
† Fred's IRA	Taxable Investment	1/31/2012 1:59 PM	\$423,000
† Frita's Taxable Brokerage	Taxable Investment	1/31/2012 2:00 PM	\$11,000,000
† New Fact	Life Insurance - Variable Unive...	1/31/2012 2:01 PM	\$323,000
† New Fact	Taxable Investment	1/31/2012 2:00 PM	\$689,000