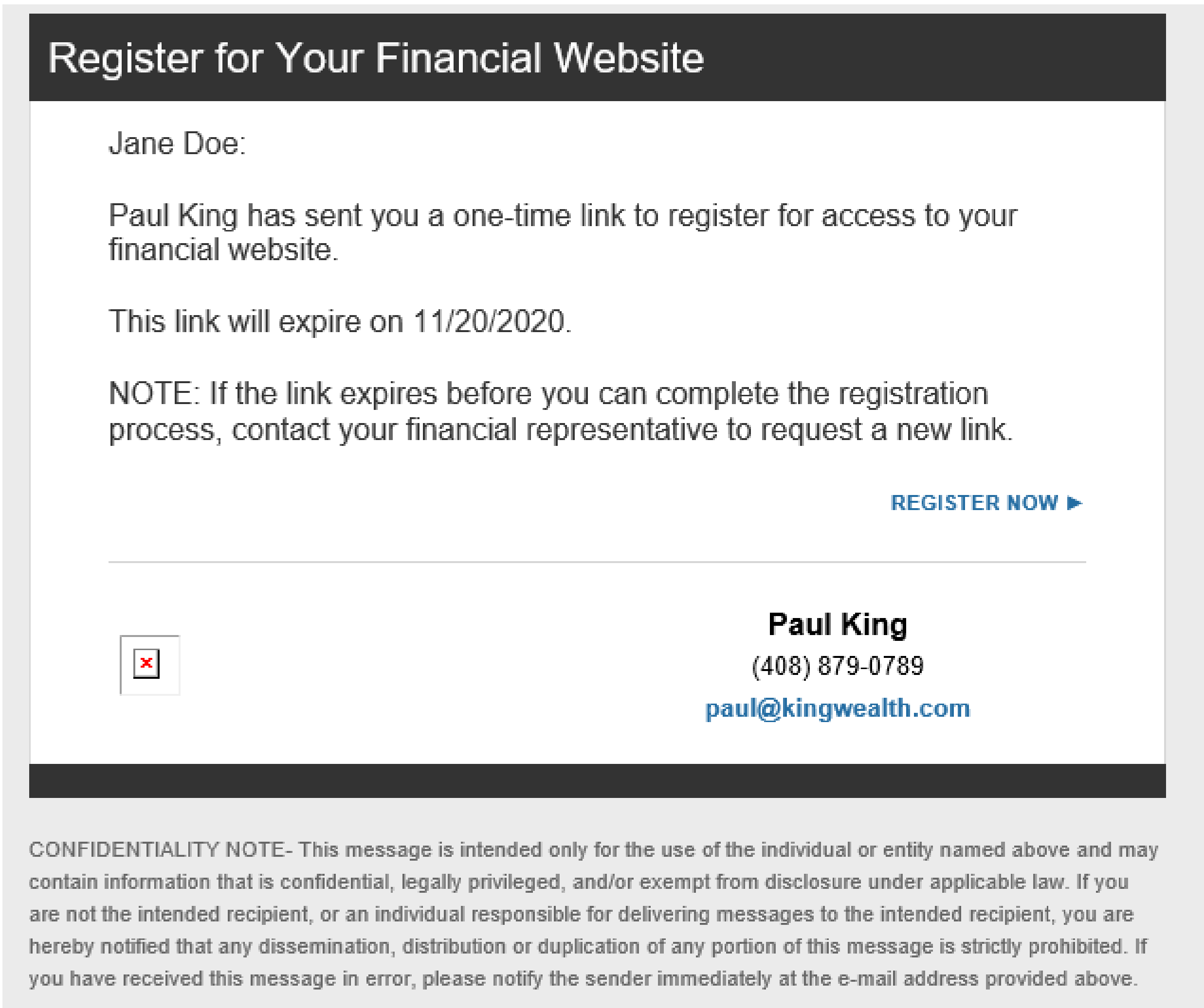
E-Money Client How Tos

To set up your Personal Planning Website (PPW):

1) Respond to the email from King Wealth Planning with a registration link:



Register for Your Financial Website

Jane Doe:

Paul King has sent you a one-time link to register for access to your financial website.

This link will expire on 11/20/2020.

NOTE: If the link expires before you can complete the registration process, contact your financial representative to request a new link.

REGISTER NOW ▶

Paul King
(408) 879-0789
paul@kingwealth.com

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2) Follow the prompts and choose a username and password, add a cell phone number for two step verification, a back up phone number and choose and populate your three security questions.

3) Once completed you will receive an email that verifies your registration:

Website Registration Confirmation

Jane Doe:

Congratulations, you are now registered and can access your financial website!

Your Username is:
janedoe13

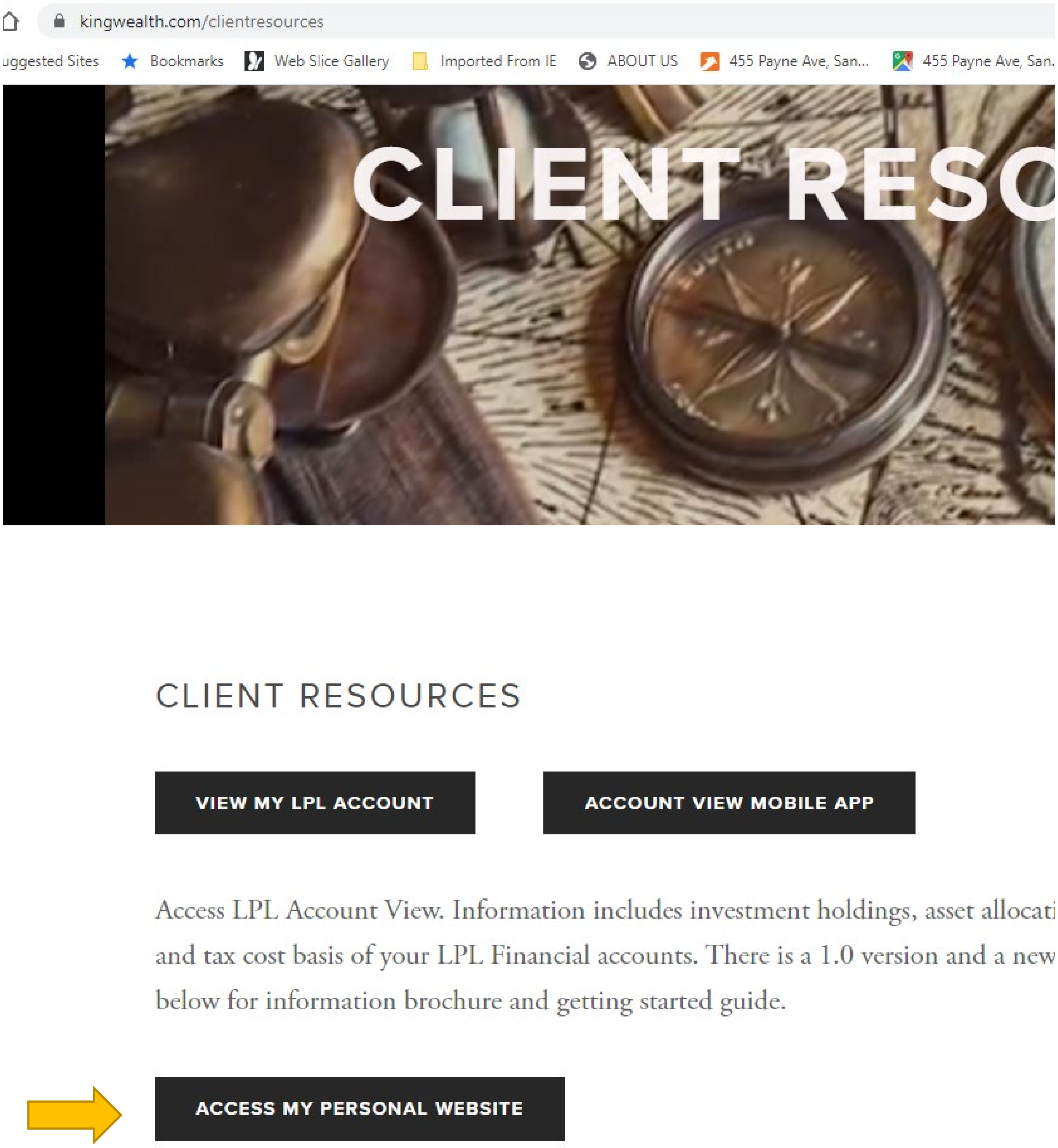
Your Website is:
https://wealth.emaplan.com/ema/SignIn?ema%2fpl%2fkingwealthplanning

Make sure to bookmark this address for easy access to your website going forward. You will need the Username and Password you created to sign into your website.

SIGN IN ▶

Paul King
(408) 879-0789
paul@kingwealth.com

Note you can access your PPW via the King Wealth Planning Website: www.kingwealth.com under the Client Resources Tab:



Bookmark this page in your browser or make a note of it.

Let’s go back to getting into your PPW from the email:

Website Registration Confirmation

Jane Doe:

Congratulations, you are now registered and can access your financial website!

Your Username is:
janedoe13

Your Website is:
https://wealth.emaplan.com/ema/SignIn?ema%2flpl%2fkingwealthplanning

Make sure to bookmark this address for easy access to your website going forward. You will need the Username and Password you created to sign into your website.

SIGN IN ▶

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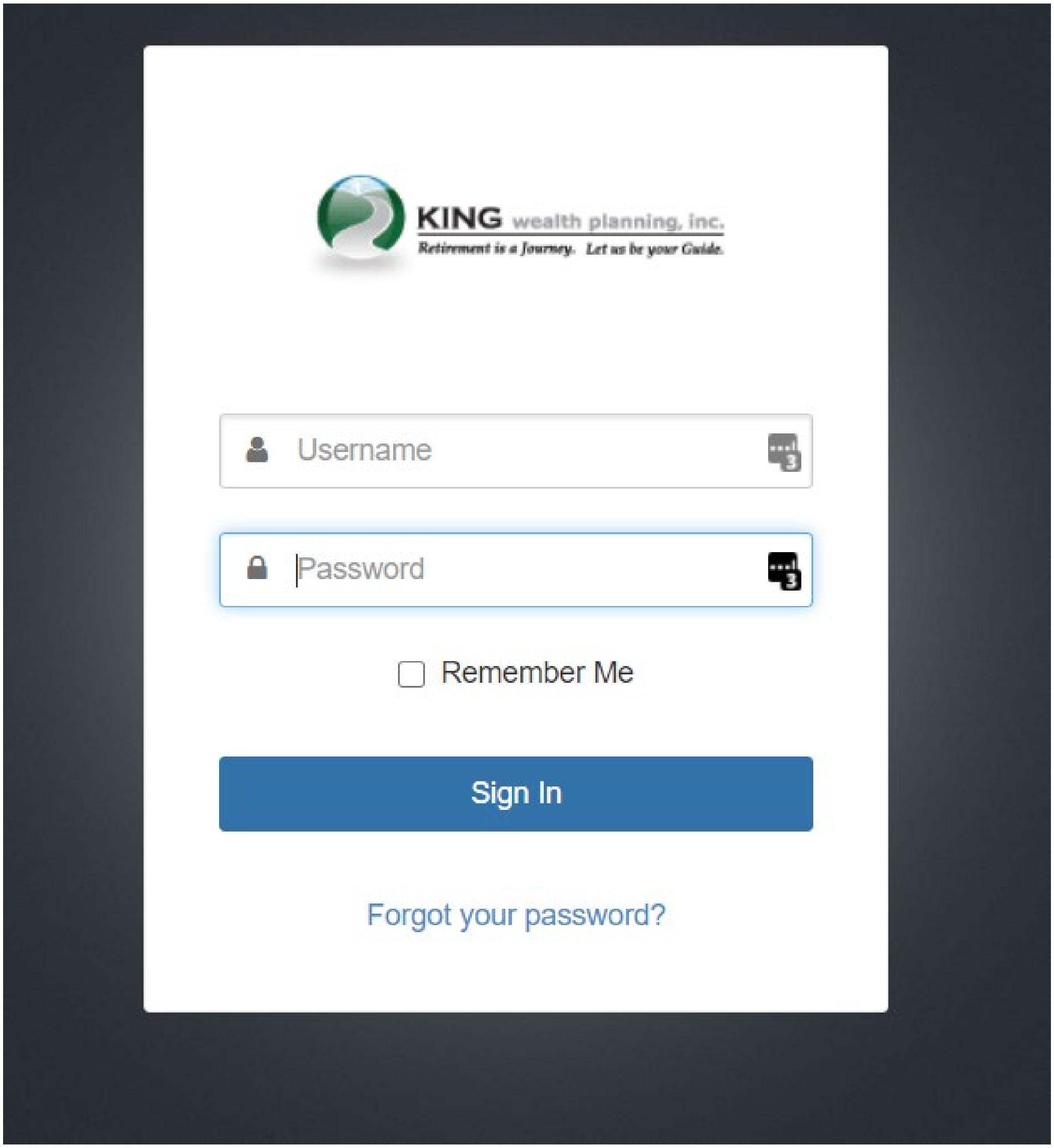
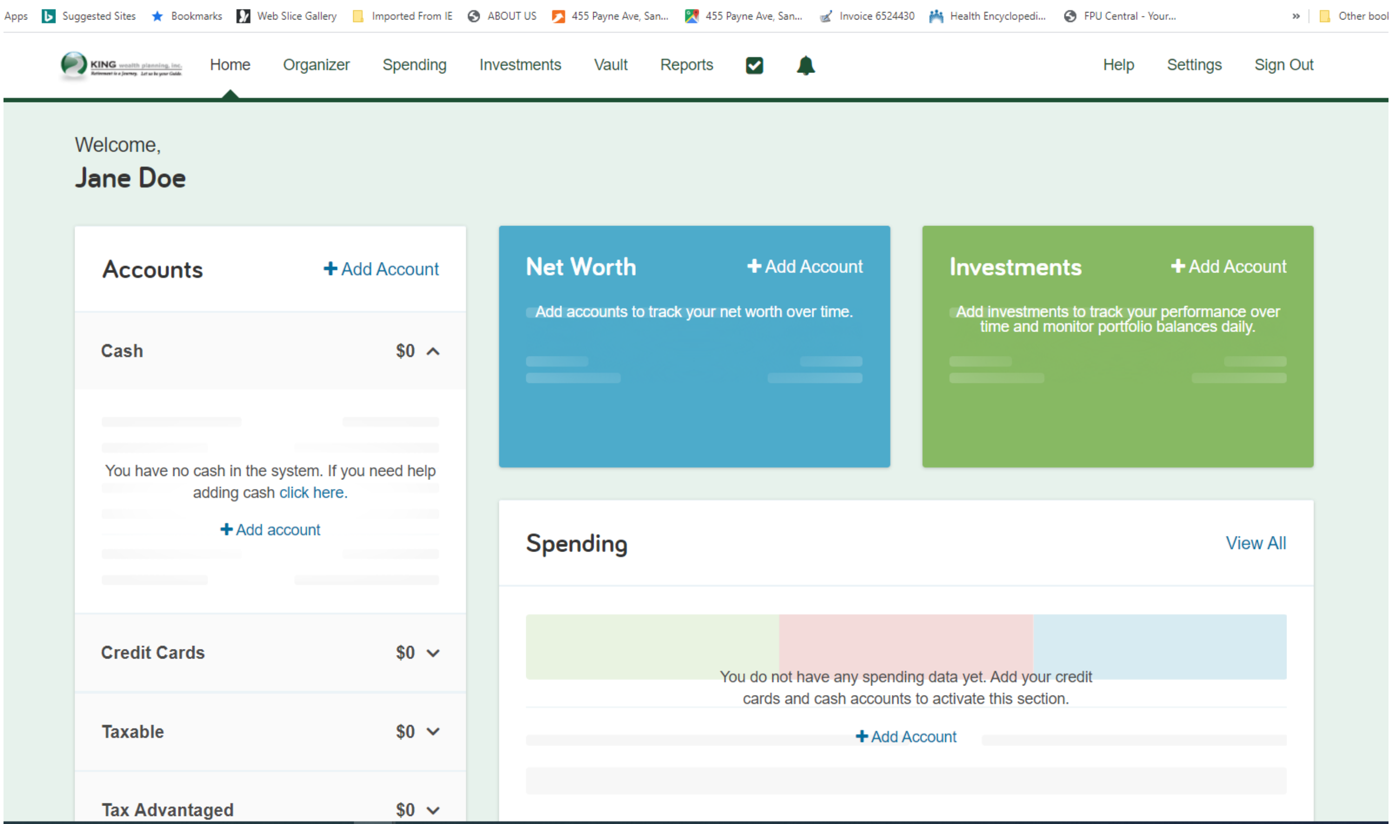
4) Click on the Sign In link

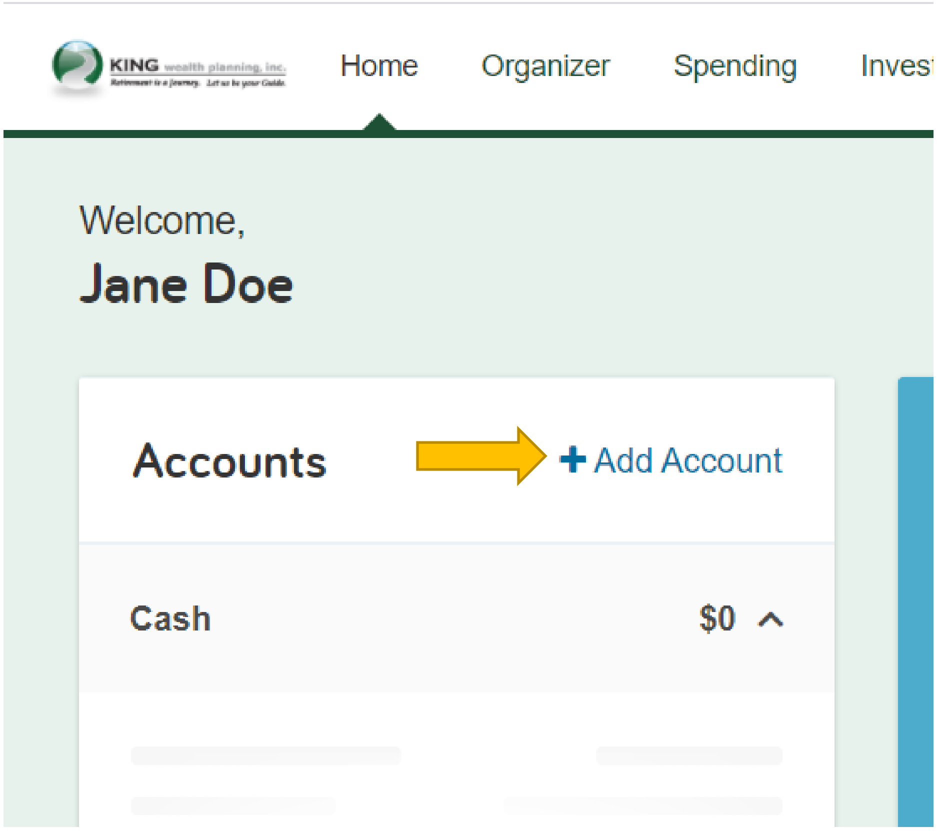
5) Enter your credentials and click on the Sign In button



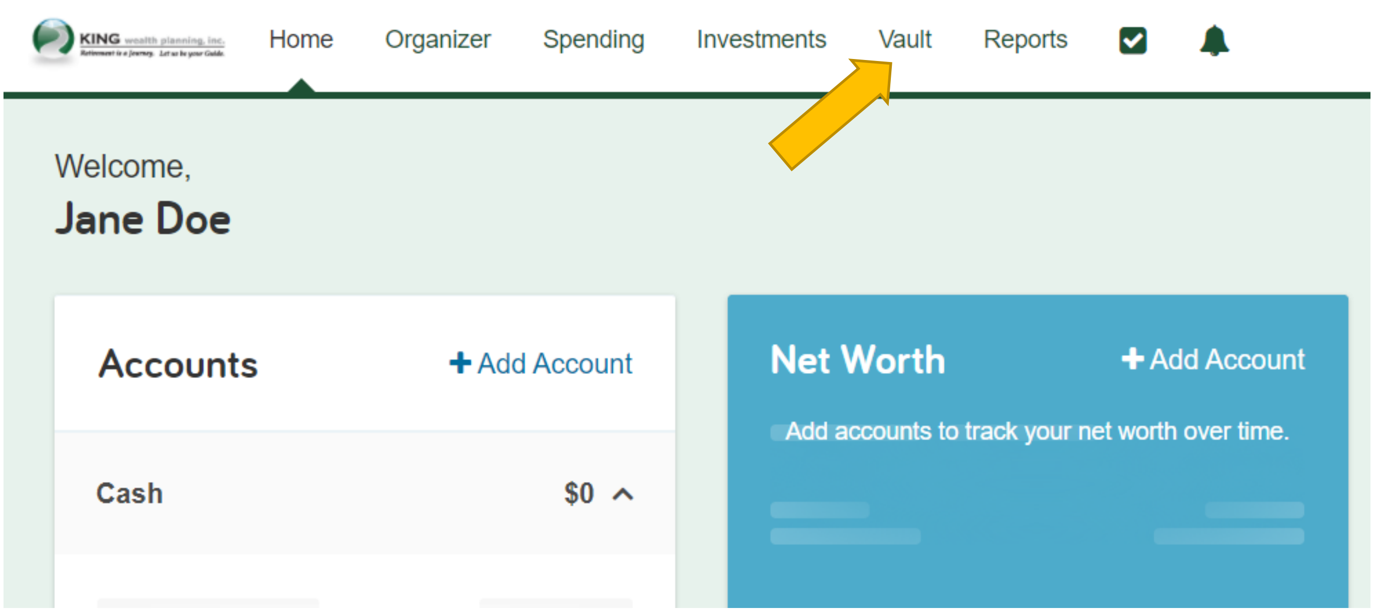
You are in! Here's what your dashboard will look like:



Notice how to add an account:

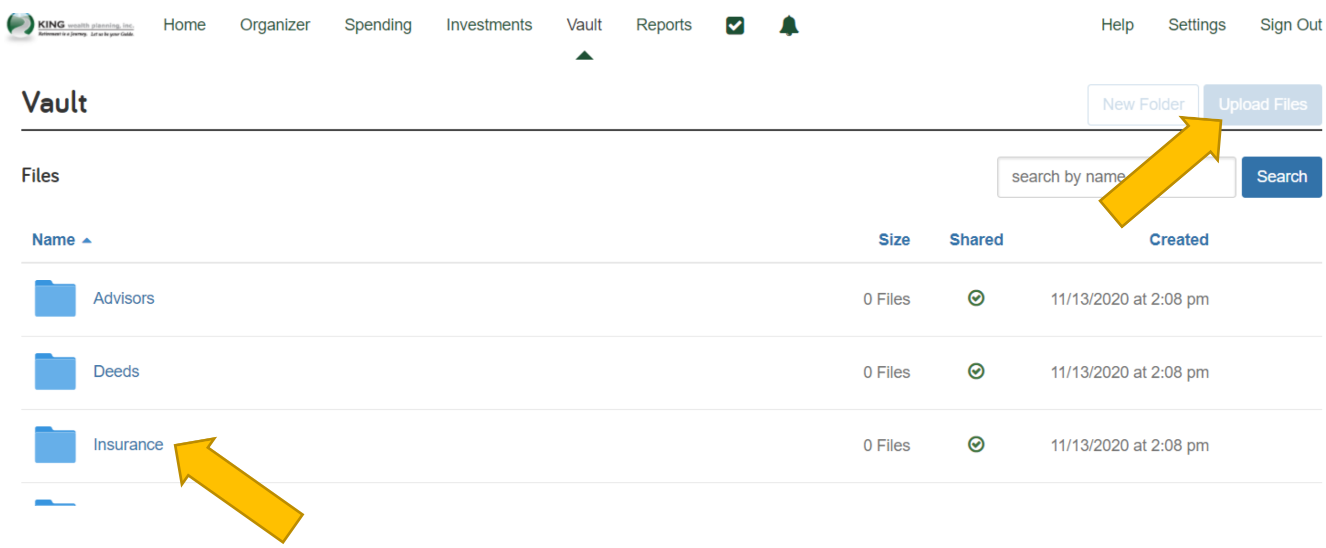


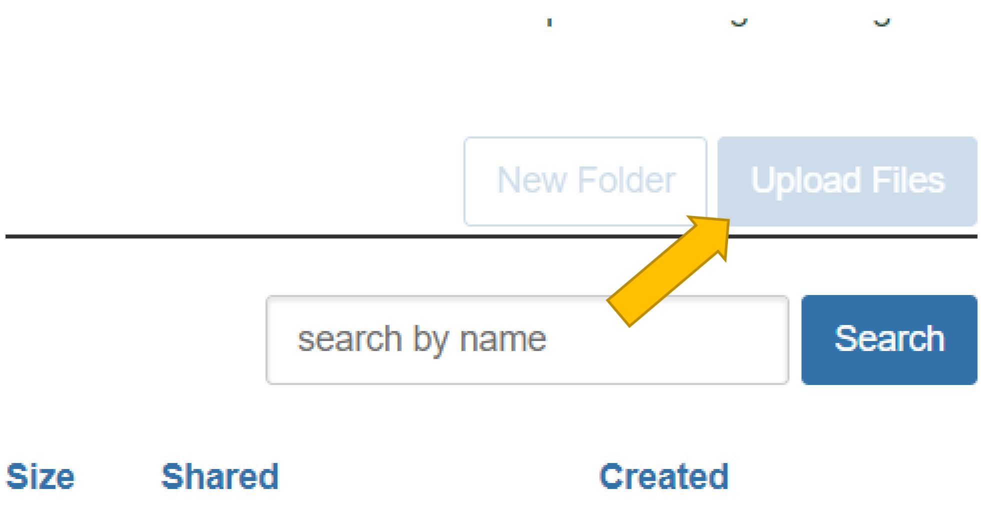
And how to access your Vault:



When adding an account, just follow the prompts.

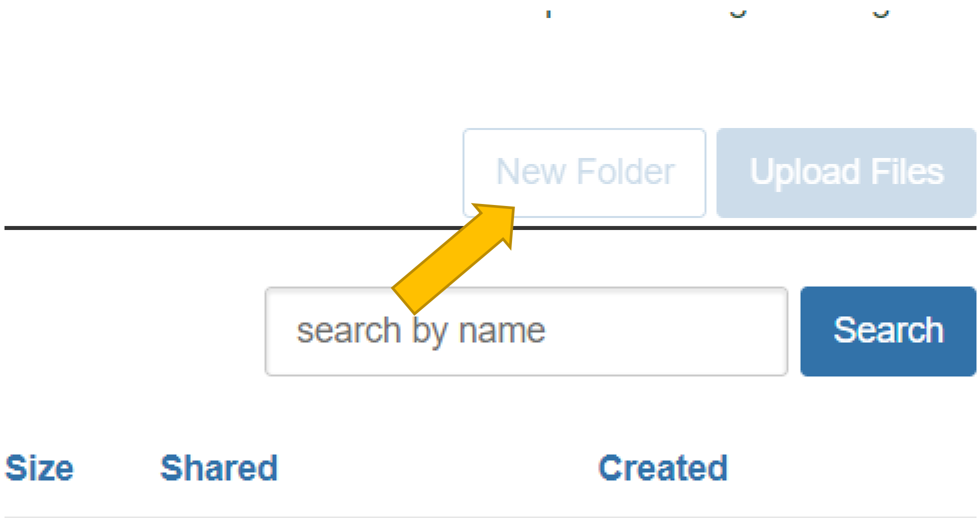
To upload documents to your vault, click on the Vault, and then you can click on the Upload Files button. To open a folder, click on the name to the right of the folder and it will open.





Important note: When uploading documents, put items you want to share with us in the “Shared Documents” folder.

You can create a new folder by clicking on the New Folder button:



This sample is a bit hard to see because we did not give Jane Doe permission to upload files or create new folders in her PPW. You, however, will have the ability to do this so your buttons will be visually clear.

Those are the basics for setting up your PPW, uploading items into your vault, shared documents and creating folders.

It is important to note that when you upload documents or make changes, we will NOT be notified. Please send us a notification email, text (408 879 0789) or give us a call to let us know. Once you upload documents, we can access them. It's a secure way to share necessary documents with us. Again, any items you wish to share with us, must be in the "Shared Documents" folder.

We hope this was helpful and please reach out with any questions!

shannon@kingwealth.com

flor@kingwealth.com