

## 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](mailto:paul@kingwealth.com)

CONFIDENTIALITY NOTE- This message is intended only for the use of the individual or entity named above and may contain information that is confidential, legally privileged, and/or exempt from disclosure under applicable law. If you are not the intended recipient, or an individual responsible for delivering messages to the intended recipient, you are hereby notified that any dissemination, distribution or duplication of any portion of this message is strictly prohibited. If you have received this message in error, please notify the sender immediately at the e-mail address provided above.

- 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](mailto:paul@kingwealth.com)

CONFIDENTIALITY NOTE- This message is intended only for the use of the individual or entity named above and may contain information that is confidential, legally privileged, and/or exempt from disclosure under applicable law. If you are not the intended recipient, or an individual responsible for delivering messages to the intended recipient, you are hereby notified that any dissemination, distribution or duplication of any portion of this message is strictly prohibited. If you have received this message in error, please notify the sender immediately at the e-mail address provided above.

Note you can access your PPW via the King Wealth Planning Website: [www.kingwealth.com](http://www.kingwealth.com) under the Client Resources Tab:



## CLIENT RESOURCES

[VIEW MY LPL ACCOUNT](#)

[ACCOUNT VIEW MOBILE APP](#)

Access LPL Account View. Information includes investment holdings, asset allocation and tax cost basis of your LPL Financial accounts. There is a 1.0 version and a new one below for information brochure and getting started guide.



[ACCESS MY PERSONAL WEBSITE](#)

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%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.

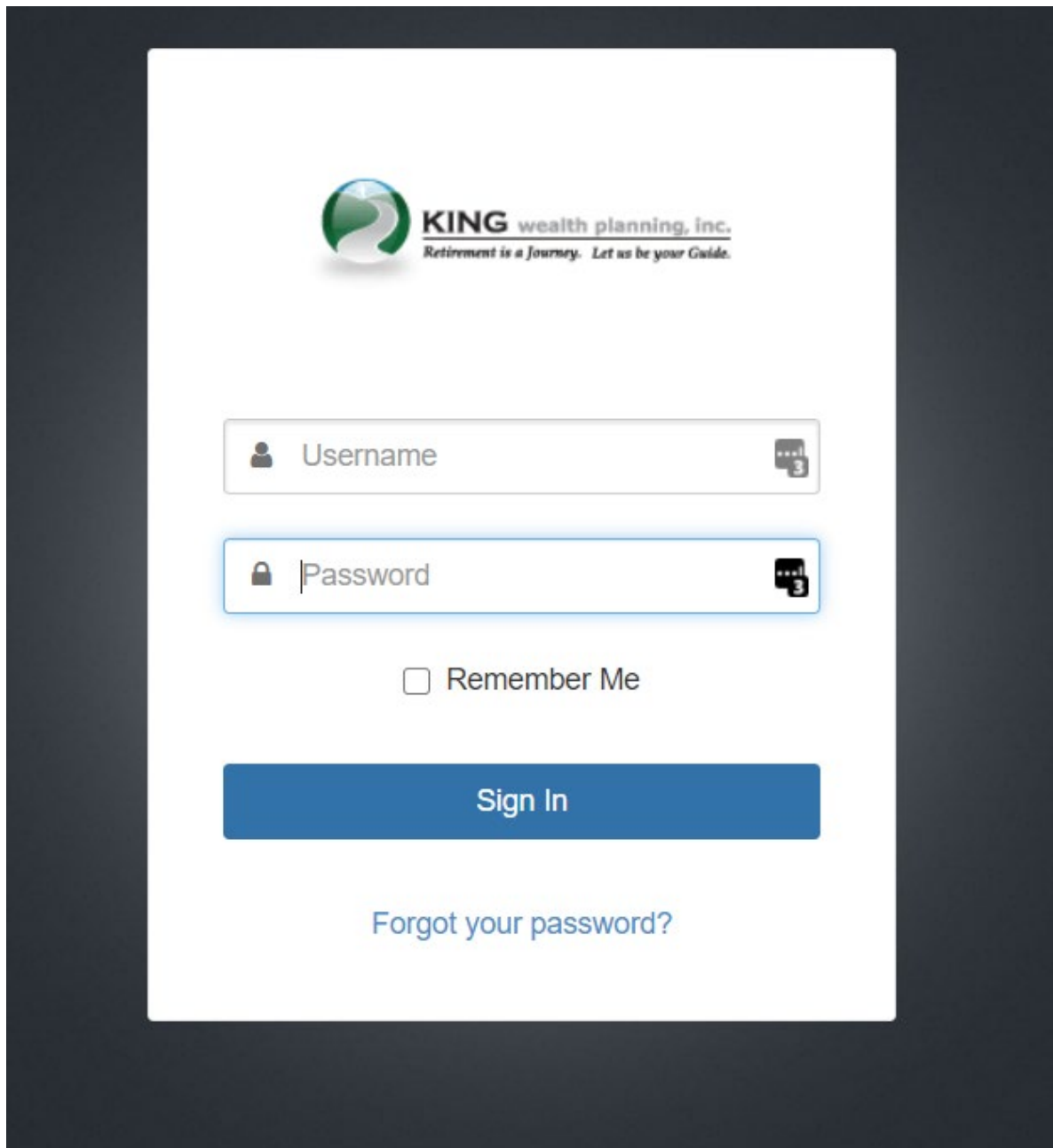



**Paul King**  
(408) 879-0789  
[paul@kingwealth.com](mailto:paul@kingwealth.com)

CONFIDENTIALITY NOTE- This message is intended only for the use of the individual or entity named above and may contain information that is confidential, legally privileged, and/or exempt from disclosure under applicable law. If you are not the intended recipient, or an individual responsible for delivering messages to the intended recipient, you are hereby notified that any dissemination, distribution or duplication of any portion of this message is strictly prohibited. If you have received this message in error, please notify the sender immediately at the e-mail address provided above.

4) Click on the Sign In link

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



 **KING** wealth planning, Inc.  
*Retirement is a Journey. Let us be your Guide.*

Remember Me

[Sign In](#)

[Forgot your password?](#)

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

Apps Suggested Sites Bookmarks Web Slice Gallery Imported From IE ABOUT US 455 Payne Ave, San... 455 Payne Ave, San... Invoice 6524430 Health Encyclopedi... FPU Central - Your... Other bool

KING Health Planning, Inc.  
Member of a family. Get the full story.

Home Organizer Spending Investments Vault Reports Help Settings Sign Out

Welcome,  
**Jane Doe**

### Accounts [+ Add Account](#)

Cash	\$0 ^
You have no cash in the system. If you need help adding cash <a href="#">click here</a> .	
<a href="#">+ Add account</a>	
Credit Cards	\$0 v
Taxable	\$0 v
Tax Advantaged	\$0 v

### Net Worth [+ Add Account](#)

[Add accounts to track your net worth over time.](#)

### Investments [+ Add Account](#)

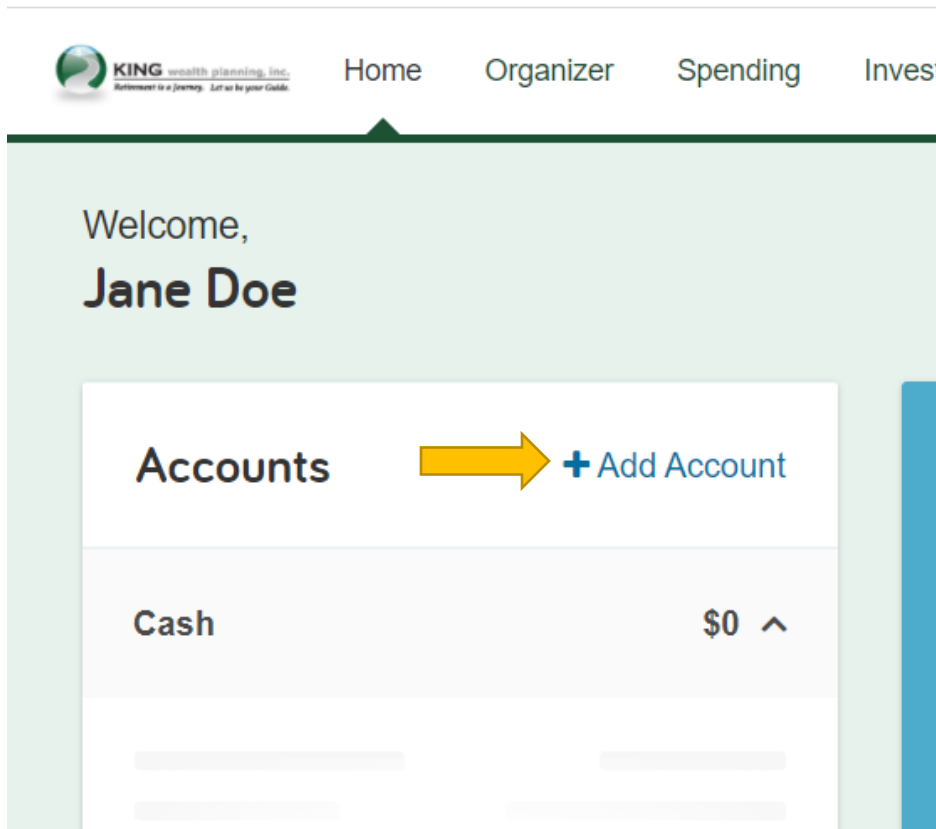
Add investments to track your performance over time and monitor portfolio balances daily.

### Spending [View All](#)

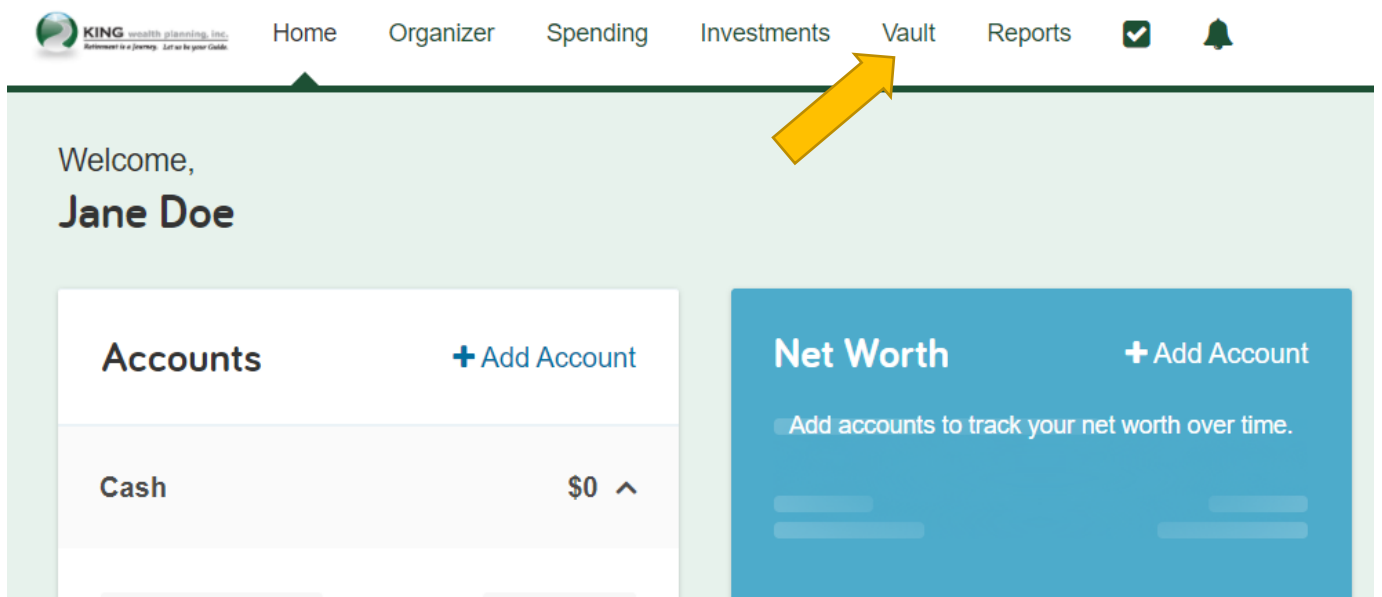
You do not have any spending data yet. Add your credit cards and cash accounts to activate this section.

[+ Add Account](#)

Notice how to add an account:

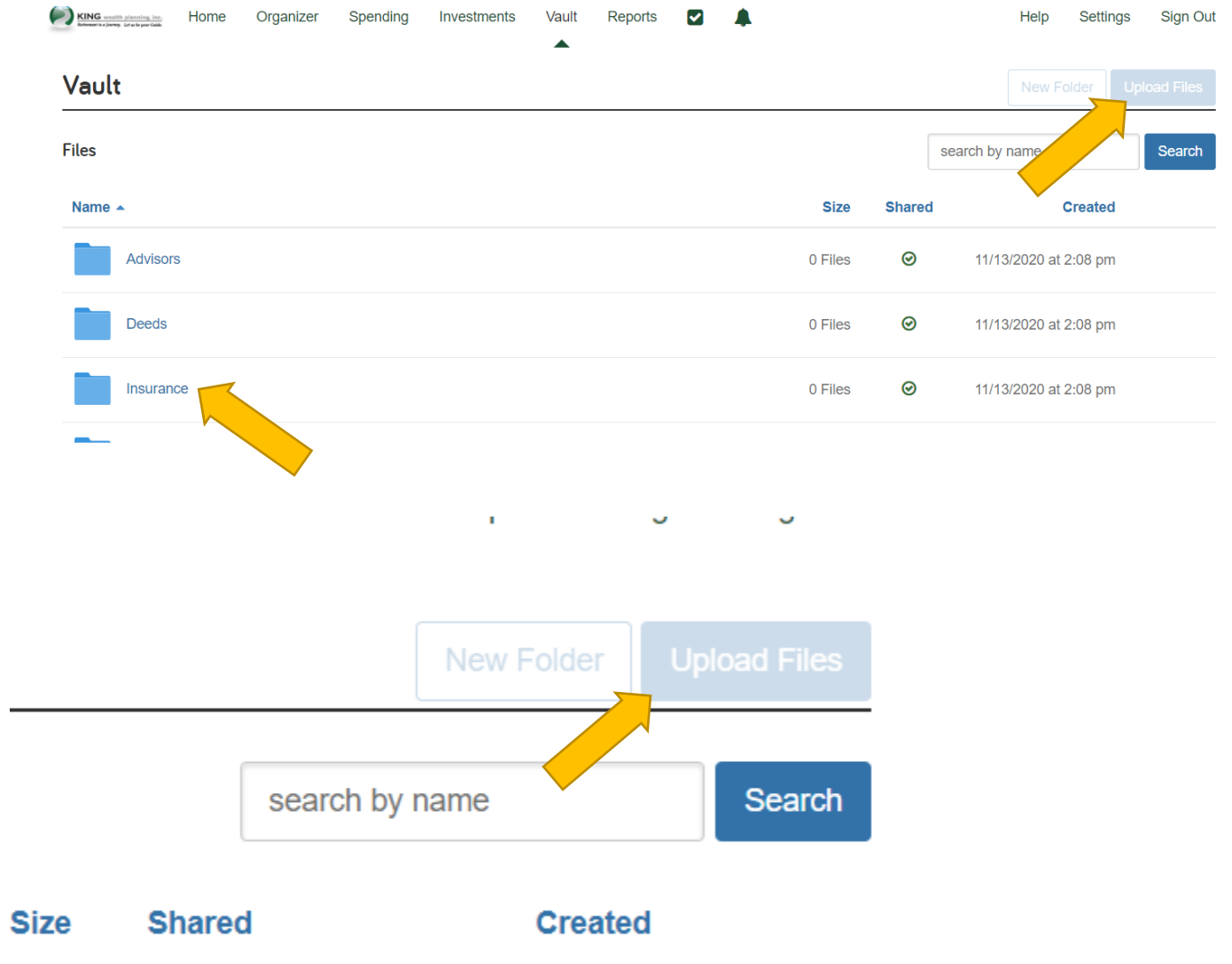


And how to access your Vault:



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.

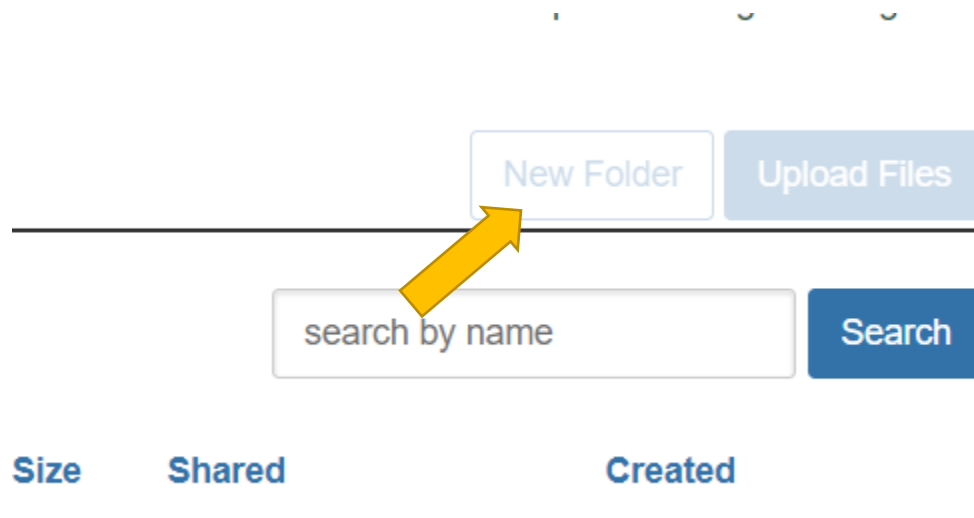


The screenshot displays the 'Vault' section of a web application. At the top, there is a navigation bar with links for Home, Organizer, Spending, Investments, Vault, Reports, and a notification bell. The 'Vault' page features a header with 'New Folder' and 'Upload Files' buttons. Below this is a search bar labeled 'search by name' and a 'Search' button. A table lists folders: 'Advisors', 'Deeds', and 'Insurance', each with '0 Files', a share status icon, and a creation date of '11/13/2020 at 2:08 pm'. A yellow arrow points to the 'Insurance' folder name. Below the table, there is a detailed view of the 'New Folder' and 'Upload Files' buttons, with a yellow arrow pointing to the 'Upload Files' button. Below this, the search bar and 'Search' button are shown again, with a yellow arrow pointing to the search input field. At the bottom, the column headers 'Size', 'Shared', and 'Created' are visible.

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](mailto:shannon@kingwealth.com)

[flor@kingwealth.com](mailto:flor@kingwealth.com)