



Connections Resources

[Connections Knowledge Base](#)

[Connections FAQ](#)

[How do clients add their accounts VIDEO](#)

[Link Manually Entered Accounts CLIENT FACING](#)



[PERSONAL FINANCIAL WEBSITE](#)

Link Manually Entered Accounts

This training guide demonstrates how to connect your manually entered facts! The process is simple and the guided workflow will help you every step of the way. You will go through this process on an account basis. There are many benefits to connecting your accounts, the most important being able to have up-to-date access to account balances and information! To begin, log in to your Personal Financial Website.



Client Resources

For Clients:

[Client Website marketing slick](#)

[Security marketing slick](#)

[Website Overview](#)

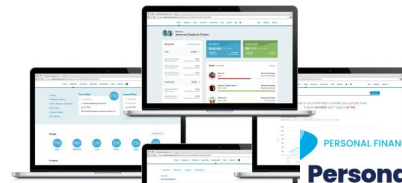
[Spending/Budgeting](#)

[Spending Categories](#)

YOUR PERSONAL FINANCIAL WEBSITE

Take Control of Your Financial World

Your Personal Financial Management website makes it easy to manage both your wealth and your well-being.



PERSONAL FINANCIAL WEBSITE

Personal Financial Website Overview

This user guide will provide an overview of the features on your Personal Financial Website. Your website is designed to give you the tools to organize your financial life and help you stay connected with your finances in one simple consolidated view.

Before your first login, you will be prompted to establish three security questions and set up 2-Factor Authentication.

PERSONAL FINANCIAL WEBSITE

Spending and Budgeting Overview

This user guide will walk you through how to use the Spending and Budgeting tools available on your Personal Financial Website. These tools allow you to build out monthly spending budgets while tracking spending habits on your connected transactional accounts. To track your spending and budgeting, you must first connect your accounts.

Note: Click on any item in the **Table of Contents** below to jump directly to the corresponding page in the document.

1 page is a living snapshot of your financial wellbeing, providing a high-level view of your information. This page is divided into separate tiles that represent the information contained within the website. Begin customizing your experience by clicking the **gear icon** in your Net Worth Summary tiles.



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Advisor Resources

For Advisors:

[Building Your Client Experience](#)

[Managing the Client Website Knowledge Base](#)

[Client Experience](#)

eMoney

HOW TO BUILD AN EXCEPTIONAL CLIENT EXPERIENCE

How to Create an Exceptional Client Experience

Creating a great experience for clients matters because it leads directly to higher AUM, revenue, and number of clients. The experience matters right now because of shifting trends in the marketplace, in technological capabilities, and in the nature of advice. Understanding this, it then makes sense to consider how you can start building your own exceptional client experience.

To create a next-level experience, it's important to first understand what clients want. Then you can begin crafting a client experience around these most closely held desires.

Managing the Client Website

eMoney

Guide to The Client Experience

This guide outlines the recommended steps to take before, during, and after you've given your Client access to their Client Website—including tips, best practices, and testimonials to set you and your Clients up for success.

BEGIN

The Rollout

Before you decide to roll out the Client Website, create a Client Website for yourself so you can understand its features. This will help anticipate and answer any questions your Clients may have, as well as discuss the value of the Client Website.

Best Practices for a Successful Rollout

- ✓ Proactively discuss Security before your Client voices any concerns
- ✓ Introduce the Client Website during an in-person meeting

