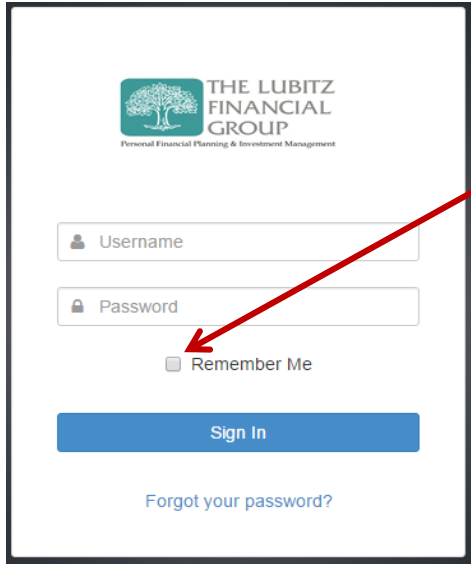




In this userguide, we will demonstrate **how to access your Quarterly Report Package that The Lubitz Financial Group has prepared and uploaded to the secure Vault within your My Money Life website.**

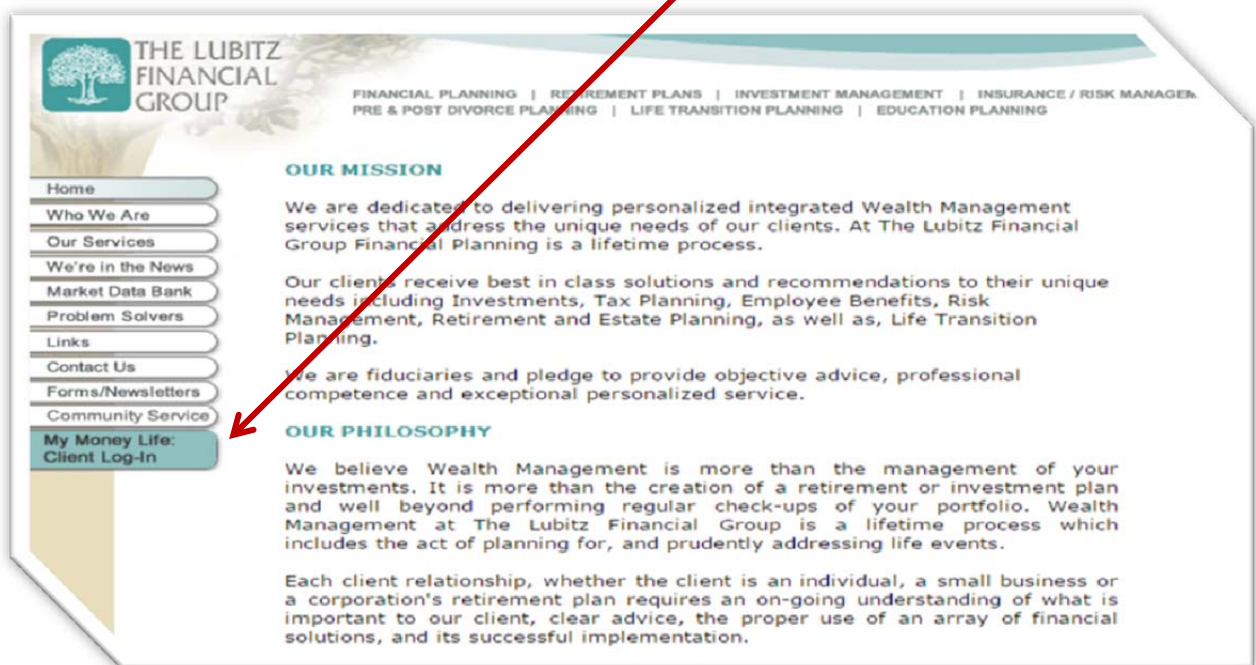
➤ Remember to use the **Username** provided to you in our email notification.

1. Sign In Page. Enter your username and password. If you have forgotten your password, please click the link and follow the prompts.



○ **“Remember Me”** – Check this box if this is your own computer or mobile phone. You will be accessing your My Money Life website again.

○ If you do not have the link to the log-in page, you can visit [www.lubitzfinancial.com](http://www.lubitzfinancial.com) at any time and click on the My Money Life: Client Log-in button on the left side of our website.



To visit My Money Life, go to: <https://wealth.emaplan.com/ema/ria/lubitzfinancial>

These training materials are intended for clients of The Lubitz Financial Group only.

For any additional questions please contact us at 305/670-4440 or [Advisors@LubitzFinancial.com](mailto:Advisors@LubitzFinancial.com)  
[www.LubitzFinancial.com](http://www.LubitzFinancial.com)



- When you log in you will see a page similar to the following. This is your home page. It will contain a snapshot of your financial picture now.

THE LUBITZ FINANCIAL GROUP  
Personal Financial Planning & Investment Management

Home Organizer Workshop Spending Investments Vault Reports Help Settings Sign Out

Set up financial alerts to receive automatic notifications about your finances! SET UP ALERTS | NO THANKS

**THE LUBITZ FINANCIAL GROUP**  
Personal Financial Planning & Investment Management

Linda Lubitz Boone, CFP®  
Advisors@lubitzfinancial.com  
Office: (305) 670-4440 All Contacts

**NET WORTH** TODAY  
**\$4,762,043**  
THIS MONTH **+\$53,801** **+1.14%**  
YEAR TO DATE **+\$475,754** **+11.10%**

**INVESTMENTS** TODAY  
**\$1,985,799**  
CHANGE<sup>2</sup> **+\$3,756.25** **+0.19%**

**ACCOUNTS**<sup>+</sup> + Add  
Cash **\$100,000** >  
Credit Cards **\$0** >  
Investments **\$1,982,043** >  
Life Insurance **\$60,000** >  
Loans **-\$360,000** >  
Property **\$2,980,000** >

**SPENDING**  
Spending is not available for Sample Clients.

**BUDGETS**  
Spending is not available for Sample Clients.

**PROTECTION**  
Whole Life Paul Price \$1,000,000  
Term Life Paul Price \$750,000  
Long-Term Care Paul Price \$200,000 Annually  
More

**AWARDS**  
Use Awards Manager provided by UsingMiles to track your frequent flyer and hotel reward points. GO TO AWARDS

- Click on the Vault navigation link at the top.

THE LUBITZ FINANCIAL GROUP  
Personal Financial Planning & Investment Management

Home Organizer Workshop Spending Investments **Vault** Reports Help Settings Sign Out

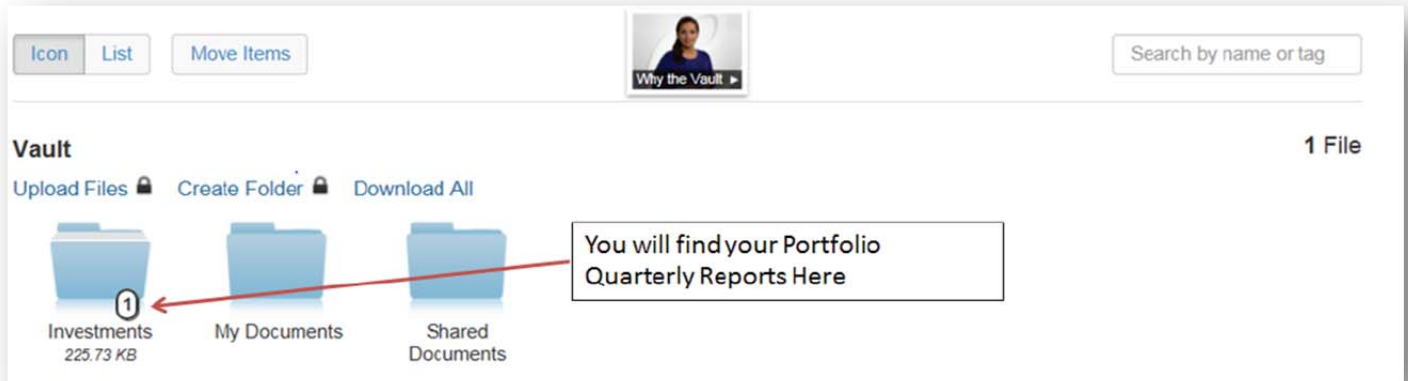
Set up financial alerts to receive automatic notifications about your finances! SET UP ALERTS | NO THANKS

**THE LUBITZ FINANCIAL GROUP**  
Personal Financial Planning & Investment Management

**NET WORTH** TODAY  
**INVESTMENTS** TODAY



- Once you access the Vault, you will then see a page similar to this. Click on the folder named Investments.



- Then click on the folder named Quarterly Reports. You will see a file with a name corresponding to the Quarter and year of the report. Click on the file to view it using a .pdf reader or download it to your computer or device how you would normally get a file from the internet. Once downloaded, you may print the document as well.

