



In this guide we will walk you through the features of My Money Life organizer tool. Use the Organizer to group all of your financial information in one place. Click the different sections to add and edit the related information. The information included here will be used to populate other areas of the application, including the Home page.

1. To access the organizer, click the **Organizer** tab from the features bar.

The screenshot displays the eMoney Advisor My Money Life Organizer interface. The top navigation bar includes 'Home', 'Organizer' (highlighted with a red circle), 'Spending', 'Investments', 'Vault', 'Reports', 'Help', 'Settings', and 'Sign Out'. The main dashboard is divided into several sections:

- Advisor Profile:** Hannah Pou, hannahp@emoneyadvisor.com, Office: (888) 362-8482, All Contacts.
- NET WORTH (TODAY):** \$1,890,928. THIS MONTH: -\$2,469 (-0.13%). YEAR TO DATE: +\$129,227 (+7.34%).
- INVESTMENTS (TODAY):** \$1,124,258. CHANGE²: \$0.00 (0.00%).
- ACCOUNTS¹:** + Add. Includes Cash (\$34,365), Credit Cards (-\$3,643), Investments (\$1,124,259), Life Insurance (\$35,500), Loans (-\$426,385), and Property (\$1,295,000).
- SPENDING:** Spending is not available for Sample Clients.
- BUDGETS:** Spending is not available for Sample Clients.
- PROTECTION:** Whole Life Guardian (Frank Miller, \$500,000), Term Life Guardian (Frank Miller, \$800,000), Term Life Met Life (Joanna Miller, \$500,000). More.
- MOBILE:** Your complete financial picture now accessible from any smart phone. LEARN MORE ►. Includes a mobile app preview image.

1 | Organizer Overview

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



2. The organizer allows you to group all of your financial information in one place as seen below.

The screenshot displays the My Money Life Organizer interface. On the left is a navigation menu with categories: Accounts, Professional Contacts, Income, Expenses, and Savings, Future Goals, Financial Priorities, and Risk Tolerance. The main area features two individual profiles for Frank Miller (FM) and Joanna Miller (JM), each with options to add phone, email, and employment. Below these is a 'People' section with five family member icons: Peter (PM), Mary Beth (MM), Lucas (LM), Elaine (EG), and Stephanie (SM), and an 'Add Person' button circled in red. The 'Property' section below includes four categories: Cars (diamond icon), Home (house icon), Jewelry (diamond icon), and Vacation Mountain Home (house icon), with an 'Add Property' button circled in red.

2 | Organizer Overview

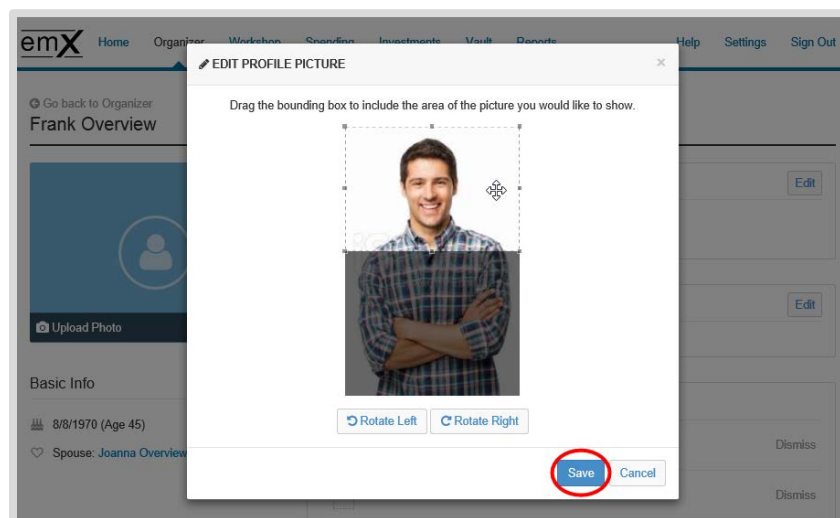
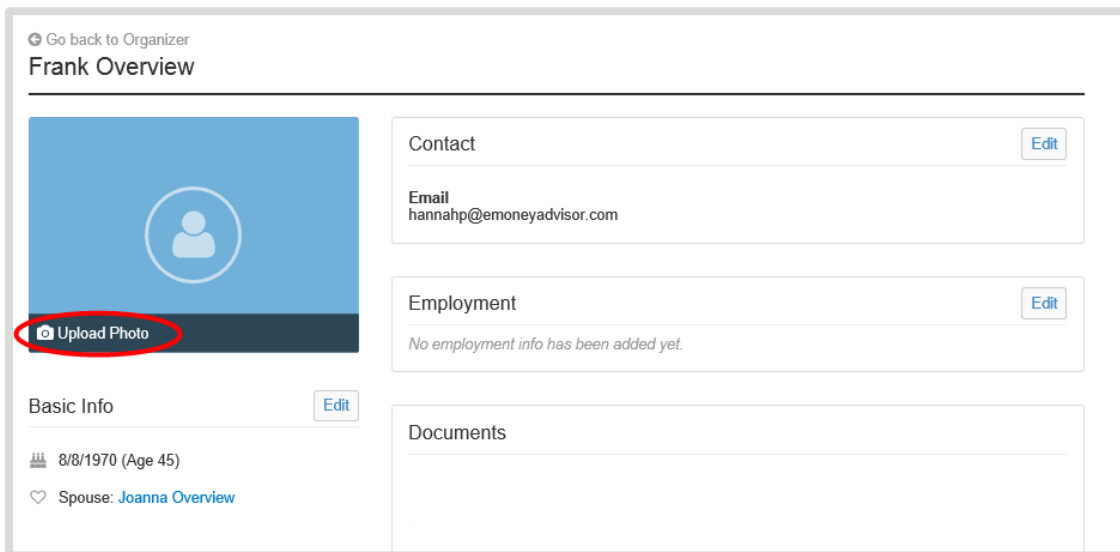
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- To modify any of your personal information or upload a profile picture to the site, click your name. To upload a picture, click **Upload a Photo** and search directly from the computer's desktop.



3 | Organizer Overview

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4. After clicking into your profile, you and your spouse can edit Basic Info, Contact and Employment Info and also upload relevant documents to your online vault.

Go back to Organizer

Frank Overview



Contact Edit

Email
hannahp@emoneyadvisor.com

Employment Edit

No employment info has been added yet.

Basic Info Edit

Documents

8/8/1970 (Age 45)

Spouse: Joanna Overview

Please Note:

Basic Info: First & Last name, DOB, Gender, Special Needs, In Good Health, and Marital Status

Contact Info: Email, Phone, Mobile Phone, Fax, and Full Address. Note that only the Mobile Phone number is what will display on the organizer overview.

Employment Info: Employer Name, Job Title, Email



5. On the organizer main tab, you will also be able to add relevant **People** and **Property**.

The screenshot displays the 'My Money Life' Organizer Overview. At the top, there are two overview cards for 'Frank Overview' and 'Joanna Overview', each with a profile picture and options to 'Add Phone', 'Add Email', and 'Add Employment'. Below these are two main sections: 'People' and 'Property'. The 'People' section contains three circular profile pictures labeled 'Mary', 'Lucas', and 'Elaine', and a red-circled 'Add Person' button. The 'Property' section contains two cards: 'Cars' (represented by a diamond icon) and 'Family Home' (represented by a house image), with a red-circled 'Add Property' button.

6. To add a person, click **Add Person** and choose what to add & enter details. You can upload a picture of each person on their individual page.

This close-up shows the 'Add Person' dropdown menu. The 'Add Person' button is circled in red. The dropdown menu is open, listing the following options: 'Child', 'Parent', 'Grandchild', 'Great Grandchild', and 'Other'. A mouse cursor is pointing at the 'Other' option.

5 | Organizer Overview

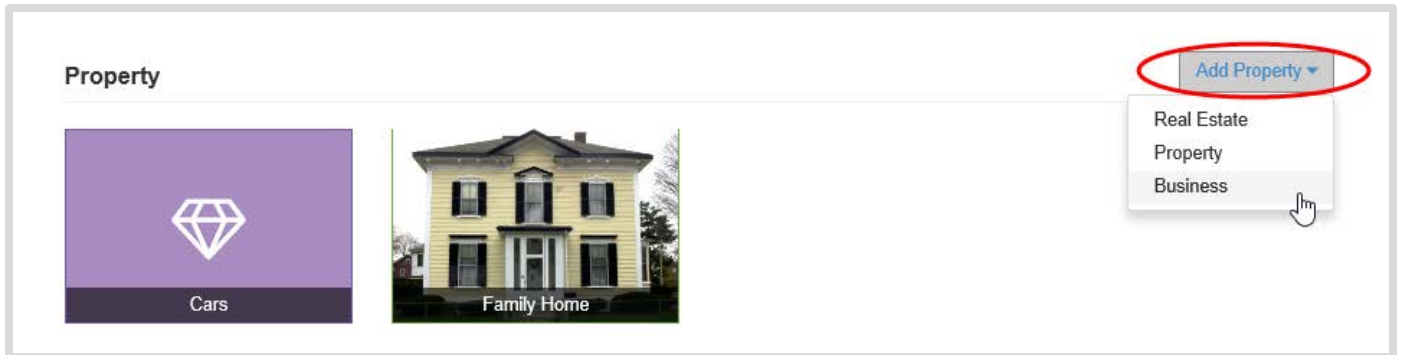
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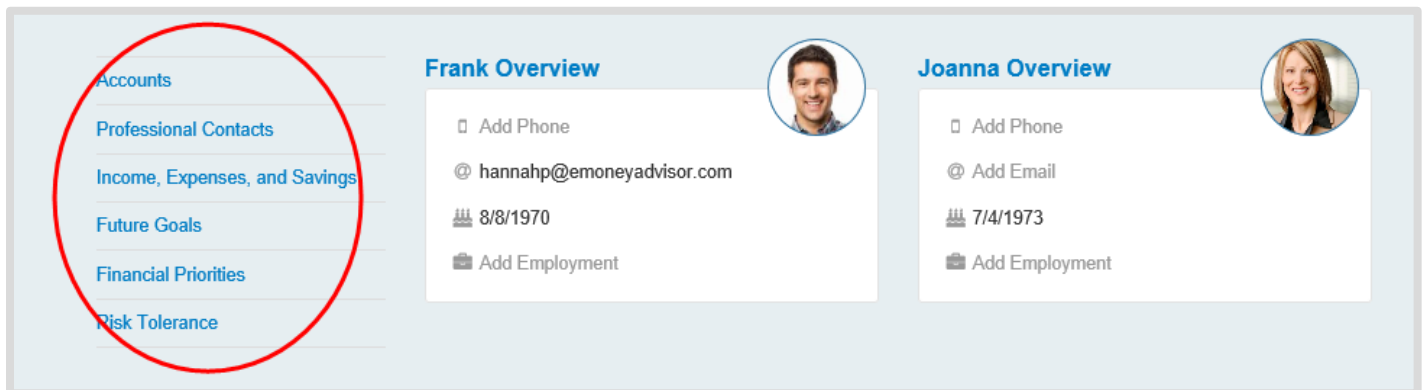
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7. To add property, click **Add Property** and select Real Estate, Property, or Business.



8. The menu options on the upper left side of the organizer tab lists out the available sections the client can view and/or modify. Click an item to view its details. Click **Add** to add information within a section, and click **Save** to save the changes.





Please Note:

Accounts: allows you to add your online accounts directly from an institution or to add them manually. Click the Add button at the top of the page to enter your institution's name or to select the icons to add insurance policies and other accounts that are not connected to your institutions.

Professional Contacts: allows you to add information about any relevant contacts. Your Advisor will always be listed first in this section. Click Add, and then add contact information.

Income, Expenses, and Savings: contains your annual income, living expenses, and savings and contributions.

Future Goals: allows you to enter in an assumed age of retirement, view existing or add education goals, and any existing or new major expenses.

Financial Priorities: used to assign an order to your financial goals. Client and Spouse can prioritize their goals.



9. The organizer allows you to add any relevant documents to an entry by utilizing the **Documents** feature within certain organizer entries. You can either upload a document from your desktop, or tie an existing vault document to the entry. Anything uploaded through documents will automatically be added to your Shared Documents folder in the vault. Below screen shot is an example of the Documents section of a Taxable Investment.

Go back to Accounts

Taxable Investment

Taxable Investment

Asset Name: Taxable Investment

Institution Name:

Owner: Frank and Joanna (Joint/ROS) + Add

Total Value: \$85,000

Holdings Value:

Cash Balance:

Margin Balance:

Tax Basis:

[View Holdings](#)

View

- [Investment Summary](#)
- [Asset Allocation](#)
- [Investment Transactions](#)
- [Delete this Account](#)

Documents

+ Add Other

[View dismissed suggestions](#)

[Save](#) [Cancel](#)



10. Professional Contacts allows you to add information on key contacts. Your advisor will always be listed first in this section.

[Go back to Organizer](#)

Professional Contacts

[Add](#)

eMoneyAdvisor, LLC
1001 E. Hector Street, Suite 401
Conshohocken, PA 19428

Hannah Pou
hannahp@emoneyadvisor.com
Office: (888) 362-8482
[Contact Me](#)

Contact Name	Role	Email	Phone
Ben Alliance	Alliance Partner	hannahp@emoneyadvisor.com	(888) 362-8482
Joe Murphy	CPA	joemurphy@nomail.com	(888) 362-8482



11. Income, Expenses, and Savings will contain your annual income, living expenses, and savings & contributions.

Income, Expenses, and Savings

Annual Income [Add](#)

Income	Value
Frank's Salary	\$90,000 ✕
Joanna's Salary	\$65,000 ✕

Annual Living Expenses [Add Itemized](#)

Annual Living Expenses	\$65,000
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12. Future Goals allows you to add retirement goals, education goals, and any major expense goals. Click Add to create a new goal.

Future Goals

Retirement

Frank's retirement age	62
Joanna's retirement age	65

Education Expenses [Add](#)

Lucas College	\$37,318 ✕
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Major Expenses [Add](#)

Addition to House	\$80,000 ✕
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13. Financial Priorities are used to help create an accurate view of your plans regarding your finances. Here you can assign an order to their financial goals.

Financial Priorities

Establishing goals can help lay the path for getting where you want to be. Prioritize what matters most to you. Don't worry, you can reorganize your priorities if they change over time.

Client	Priority	Goal
Frank	1	Saving for College
	2	Planning for Retirement
	3	Managing a Budget
	4	Providing a Legacy
	5	
	6	
Joanna	1	Insuring Your Life
	2	Creating Retirement Income
	3	Saving for College
	4	Contributing to Charity
	5	Providing a Legacy
	6	Saving for Major Purchases