

# Your New Personal Financial Website

Mobile



The Answers You Need, **Wherever You Are.**

| ACCOUNTS                    |           |
|-----------------------------|-----------|
| ABC Financial               |           |
| Checking ABC                | \$1,200   |
| Vault                       | -\$800    |
| Insurance Policies          |           |
| Disability Policy from Work | \$140,000 |
| Term Life on Luke           | \$500,000 |
| Term Policy for Jen         | \$500,000 |

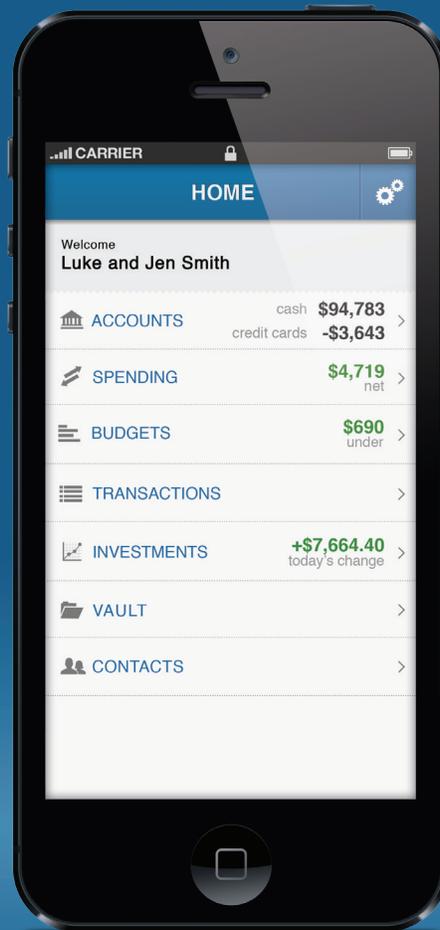
All Your  
**Accounts** on  
One Page.

| INVESTMENTS           |              |
|-----------------------|--------------|
| CURRENT VALUE         |              |
|                       | \$895,437    |
| +17,000 (+1.9%)       |              |
| 529 Virginia Plan     | \$50,640.00  |
| 401K                  | \$334,945.00 |
| Roth 401K             | \$146,716.00 |
| Roth IRA (converted)  | \$120,903.30 |
| Married Lynch Account | \$242,232.38 |

Get Updated  
on Your  
**Investments.**

| BUDGETS           |         |
|-------------------|---------|
| APRIL             |         |
| \$0               | \$1,084 |
|                   | \$2,848 |
| AUTO & TRANSPORT  | \$132   |
| BILLS & UTILITIES | \$400   |
| FEES & CHARGES    | \$164   |
| SHOPPING          | \$460   |
| TAXES             | \$450   |

Track Your  
Progress  
Towards  
Your **Goals.**



See Your  
**Transactions.**

| TRANSACTIONS |                           |             |
|--------------|---------------------------|-------------|
| APRIL        |                           |             |
| APR 07       | GENERATED AUTO/TRANSPORT  | -\$356.00   |
| APR 07       | WELLS FARGO               | -\$2,400.00 |
| APR 07       | PIR                       | -\$356.00   |
| APR 07       | EMVLES                    | -\$3.22     |
| APR 07       | FEES                      | -\$1.00     |
| APR 07       | OVERDRAFT PROTECTION      | \$0.22      |
| APR 07       | FEES                      | -\$250.00   |
| APR 07       | PORCHE FINANCIAL SERVICES | -\$638.11   |
| APR 07       | WIKIE FOODS MARKET        | -\$80.25    |

Monitor Your  
**Spending.**

| SPENDING         |             |
|------------------|-------------|
| APRIL            |             |
| INCOME           |             |
| EXPENSES         |             |
| INCOME           |             |
| \$11,950.00      |             |
| MORTGAGE & RENT  | -\$2,400.00 |
| AUTO & TRANSPORT | -\$1,632.22 |
| TAXES            | -\$858.00   |
| CASH/ATM         | -\$740.00   |
| FOOD             | -\$160.50   |
| FEES & CHARGES   | -\$151.56   |
| MEDICAL          | -\$30.00    |
| BUSINESS         | -\$6.44     |
| TRANSFERS        | -\$1,348.48 |

Access  
Important  
**Documents.**

| VAULT              |          |
|--------------------|----------|
| My Documents       | 12 Files |
| Pictures           | 1 File   |
| Shared Documents   | 0 Files  |
| Birth Certificates | 0 Files  |
| Tax Documents      | 14 Files |
| Trusts             | 0 Files  |

Your Personal Financial Mobile Website can be accessed on the iPhone, Android, Blackberry and most other popular smart phones.

### Here's how to get started:

1. Request an email with a link to your mobile site. You can find the email request option on the bottom right corner of your full Personal Financial Website's home page.
2. Using your smart phone, access your email and click on the URL provided. Before logging on, add or save the link to your smart phone's Home Screen.
3. The first time you logon enter the same User Name and Password you use to access your full Personal Financial Website. After this initial logon, you'll be prompted to register your device and create a 4 digit PIN for even easier access in the future.

**Have questions? Give us a call or send us an email, we are here to help.**

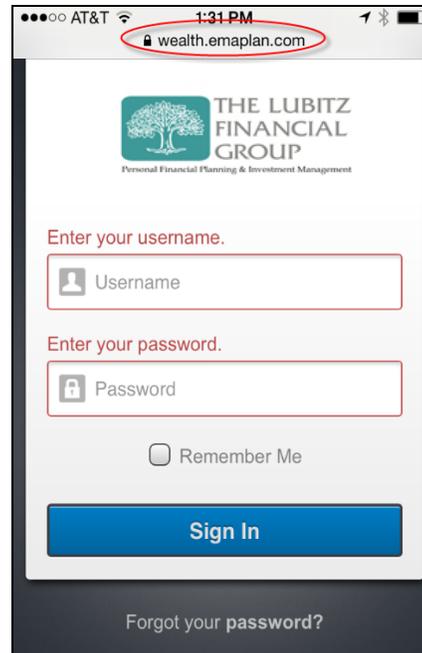


This training guide will demonstrate how to add a custom logon page to an iPhone or iPad.

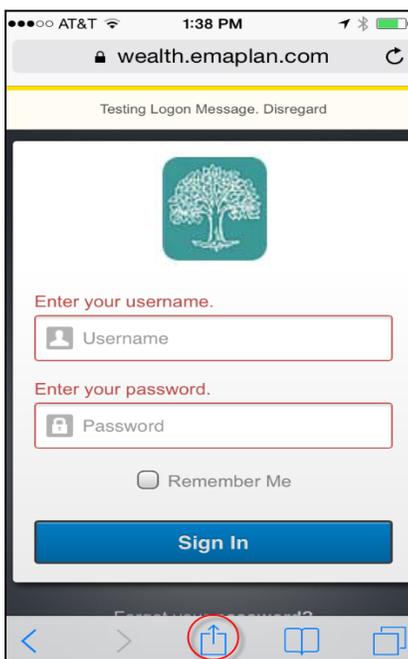
Step 1: Open Safari



Step 2: Enter custom URL (see text box below)



Step 3: Click icon at bottom



Please Note:

To find the URL, please reference the email we sent you or click:

<https://wealth.emaplan.com/ema/ria/lubitzfinancial>

If you are not sure what the URL address is, you can find it in The Lubitz Financial Group website under My Money Life login.

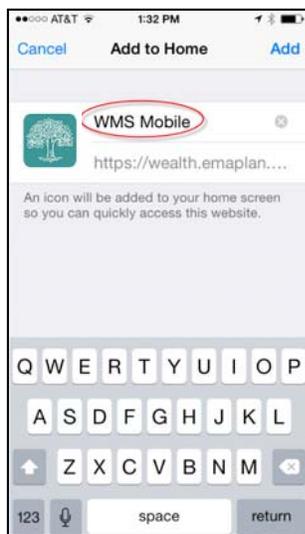
1 | My Money Life Mobile – Bookmarking the site in iPhone/iPad



Step 4: Choose **Add to Home Screen**



Step 5: Customize App Name and click **ADD**



Step 6: Access eMoney Here

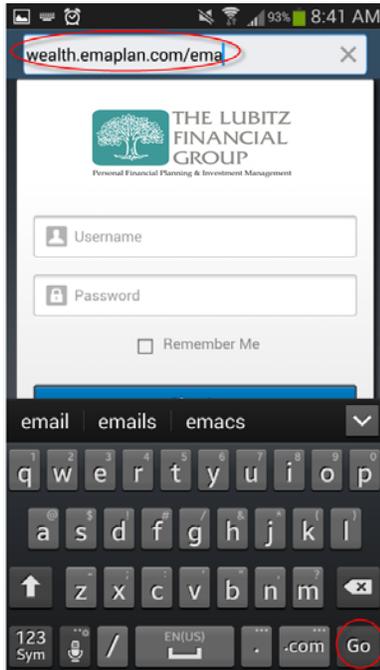


2 | My Money Life Mobile – Bookmarking the site in iPhone/iPad



In this user guide we will demonstrate how to create a bookmark in a Samsung Android Device.

- 1) Open a browser on the Samsung Android Device.
- 2) Type in the URL address. Click **Go**.



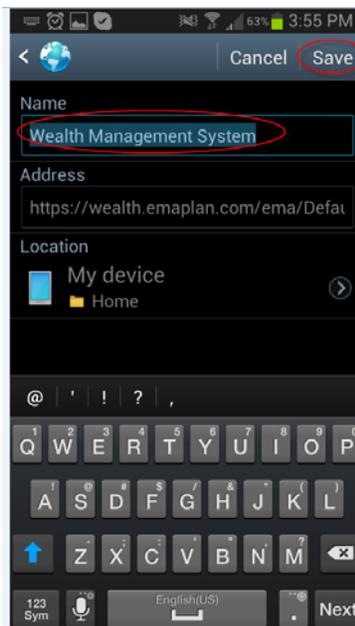
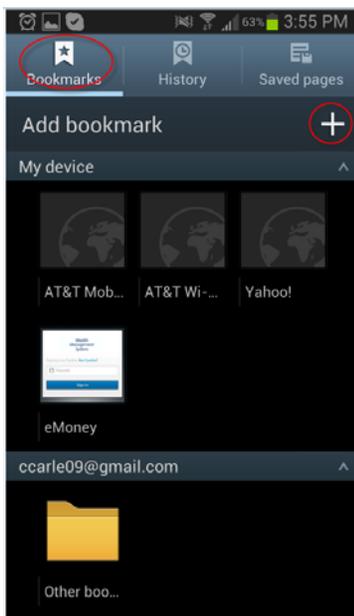
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- 3) Choose Bookmarks. Click the "+" (plus) sign. Rename the bookmark as desired, then click **SAVE**.

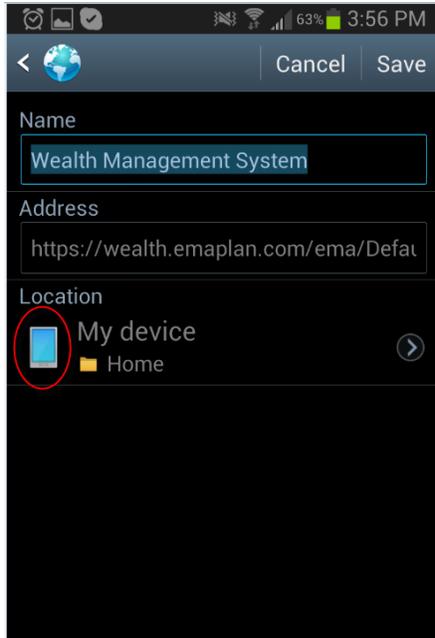


## 1 | My Money Life Mobile – Bookmarking the site in Android Smartphones



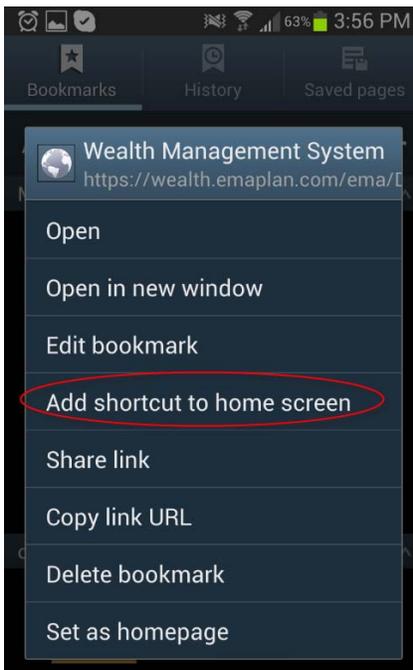
- 4) A bookmarked icon of this page will now appear under the “My Device” category. Press and hold this icon until a menu appears.

1.



- 5) Select “Add shortcut to home screen.”

- 6) The icon logo should now appear on the home page.



## 2 | My Money Life Mobile – Bookmarking the site in Android Smartphones

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)