

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. Login to My Money Life Website. <u>Click here</u> to go to the login page or copy the following link in your browser: <u>https://wealth.emaplan.com/ema/ria/lubitzfinancial</u>
- 2. Enter your username and password. You can find your username in the body of the email you received



• To access My Money Life Login, you can also visit <u>www.lubitzfinancial.com</u> at any time and click on the My Money Life: Client Log-in <u>button</u> on the right side of our website.



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



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

THE LUBITZ FINANCIAL GROUP	er Workshop Spending Inves	tments Vault Reports 🗹	•		Help Settings Sign Ou
lcome,					
Accounts	+ Add Account	Net Worth	+Add Account	Investments	+ Add Account
Cash	\$0 ^			portfolio bala	ances daily.
You have no cash in the system. If	you need help adding cash click				
+ Add a	ccount	Spending			View All
Credit Cards	\$0 ~		You do not have any spending data accounts to acti	yet. Add your credit cards and cash vate this section.	
faxable	\$0 ~		+ Add	Account	
Tax Advantaged	\$0 ~				
Life Ins Cash Values	\$0 V \$0 V	Protection			View All
Property	\$0 ~		You do not have any Add accounts to a	r protection accounts. ctivate this section.	

4. Click on the Vault navigation link at the top.

THE LUBITZ FINANCIAL GROUP Preved Frence & Inserver Management	Home	Organizer	Workshop	Spending	Investments Vault Re	eports 🔽						
Welcome,												

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• If you use a **tablet** (iPad/Surface/Android), you may have the navigation **me**nu on the top right of the screen, **click on the Menu button and tap on the Vault.** 

MENU	-	THE LUBITZ FINANCIAL GROUP				
Home				ħ	lew Folder	pload Files
Organizer						
Workshop				searc	h by name	Search
Spending			Size	Shared	Created	
Investments			1 File	Ø	5/31/2013 9:13 pm	
Vault	nts		0 Files	0	9/20/2019 7:48 am	
Settings			0 Files	0	5/31/2013 9:13 pm	
Sign Out	d Applications		0 Files	0	9/20/2019 7:48 am	
Insu	urance		0 Files	0	5/31/2013 9:13 pm	
Inve	estments		1 File	0	5/31/2013 9:13 pm	

5. Once you access the Vault, you will then see a page similar to this

Riverstand Home Organizer Workshop Spending Investments Vault Reports			Help Settings Sign Out
Vault			New Folder Upload Files
Files		search by name	Search
Name 🔺	Size	Shared	Created
Agreements	0 Files	Ø	3/8/2015 at 9:07 pm
Financial Plan Reports	0 Files	Ø	3/8/2015 at 9:07 pm
Financial Statements	0 Files	0	3/7/2017 at 8:59 am
Forms and Applications	0 Files	Ø	3/7/2017 at 8:59 am
Insurance	0 Files	Ø	3/8/2015 at 9:07 pm
Investments	12 Files	0	3/8/2015 at 9:07 pm
Legal and Estate	2 Files	0	3/8/2015 at 9.07 pm
My Documents	0 Files		3/8/2015 at 9:07 pm
K Portfolio Reports	2 Files	0	_
Reports	3 Files	0	3/8/2015 at 9:07 pm
Shared Documents	1 File	0	3/8/2015 at 9:07 pm

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6. Click on the folder named **Portfolio Reports.** 



7. Then you will see a file with a name **Quarterly Performance Review** with 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, the same way you would normally get a file from the internet. Once downloaded, you may print the document as well.

Vault			New Folder	
Files > Portfolio Reports		search by name		Search
Name 🔺	Size	Shared	Created	
Quarterly Performance Review - 07/01/2019 - 09/30/2019.pdf		Ø	2/28/2020 at 12:37 pm	Actions -
Quarterly Performance Review - 10/01/2019 - 12/31/2019.pdf		Ø	2/28/2020 at 9:21 am	Actions -
Usage: 49.06 MB (0 B are private)				