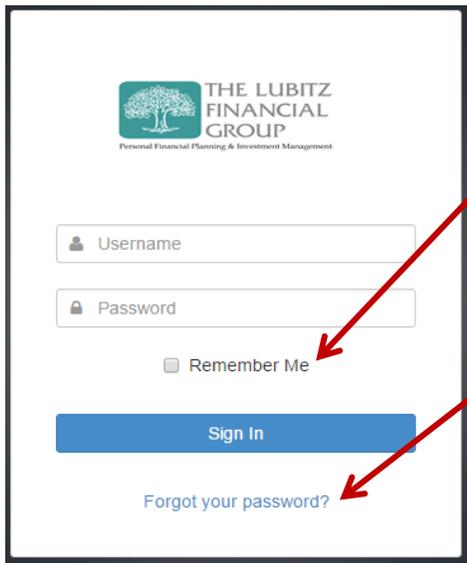




In this userguide, we will demonstrate **how to access your Quarterly Report Package that The Lubitz Financial Group has prepared and uploaded to the secure Vault within your My Money Life website.**

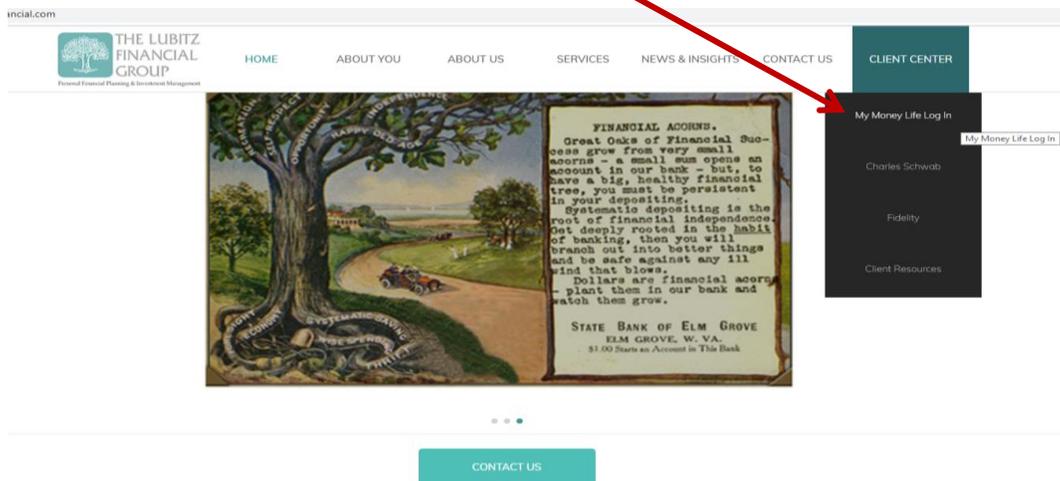
➤ Remember to use the **Username** provided to you in our email notification.

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



- **“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 have forgotten your password, click the **“Forgot Your Password”** link as shown in the image and follow the prompts to set a new one

- To access My Money Life Login, you can also visit [www.lubitzfinancial.com](http://www.lubitzfinancial.com) at any time and click on the My Money Life: Client Log-in button on the right side of our website.





- 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.

Welcome,

**Accounts** + Add Account

Cash \$0 ^

You have no cash in the system. If you need help adding cash click [here](#).

+ Add account

Credit Cards \$0 v

Taxable \$0 v

Tax Advantaged \$0 v

Life Ins Cash Values \$0 v

Loans \$0 v

Property \$0 v

**Net Worth** + Add Account

Add accounts to track your net worth over time.

**Investments** + Add Account

Add investments to track your performance over time and monitor portfolio balances daily.

**Spending** View All

You do not have any spending data yet. Add your credit cards and cash accounts to activate this section.

+ Add Account

**Protection** View All

You do not have any protection accounts. Add accounts to activate this section.

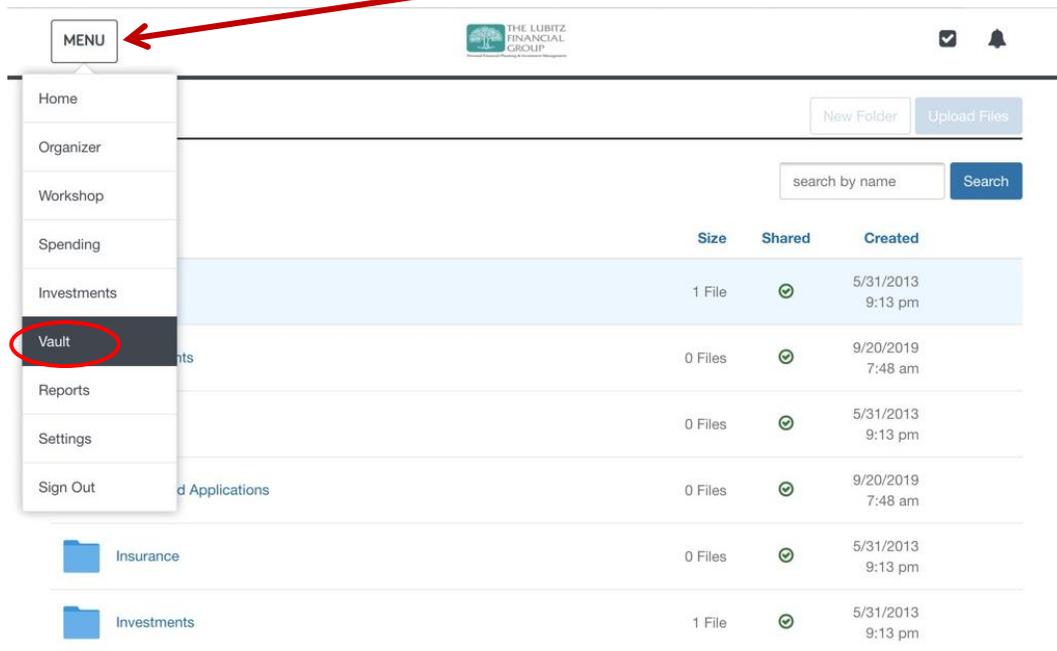
- Click on the **Vault** navigation link at the top.

THE LUBITZ FINANCIAL GROUP

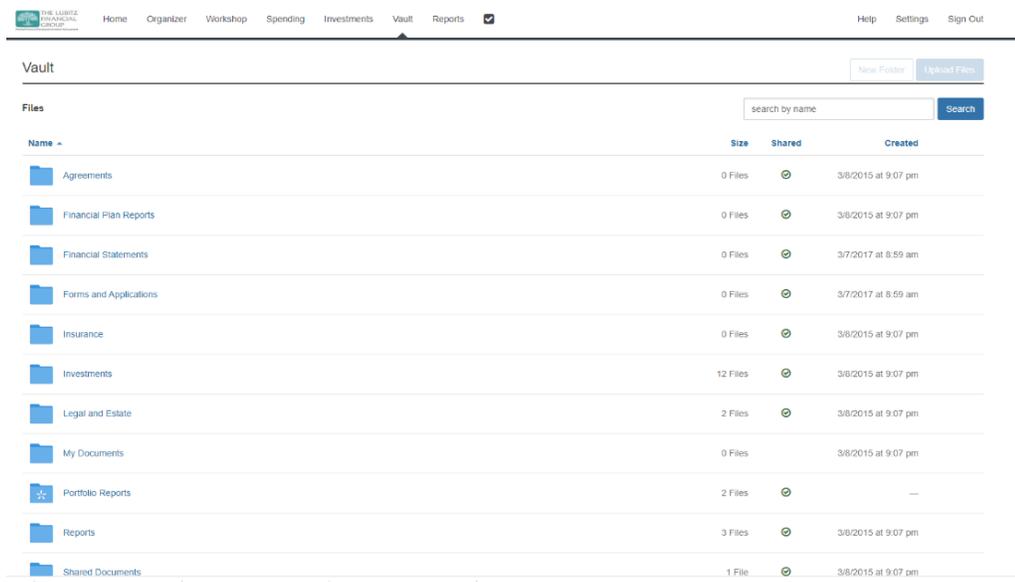
Home Organizer Workshop Spending Investments **Vault** Reports



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



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





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



Portfolio Reports

- 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 Upload Files

Files > Portfolio Reports

search by name

Search

| Name   | Size | Shared  | Created               |         |
|--|------|---|-----------------------|---------|
|  Quarterly Performance Review - 07/01/2019 - 09/30/2019.pdf | —    |  | 2/28/2020 at 12:37 pm | Actions |
|  Quarterly Performance Review - 10/01/2019 - 12/31/2019.pdf | —    |  | 2/28/2020 at 9:21 am  | Actions |

Usage: 49.06 MB (0 B are private)