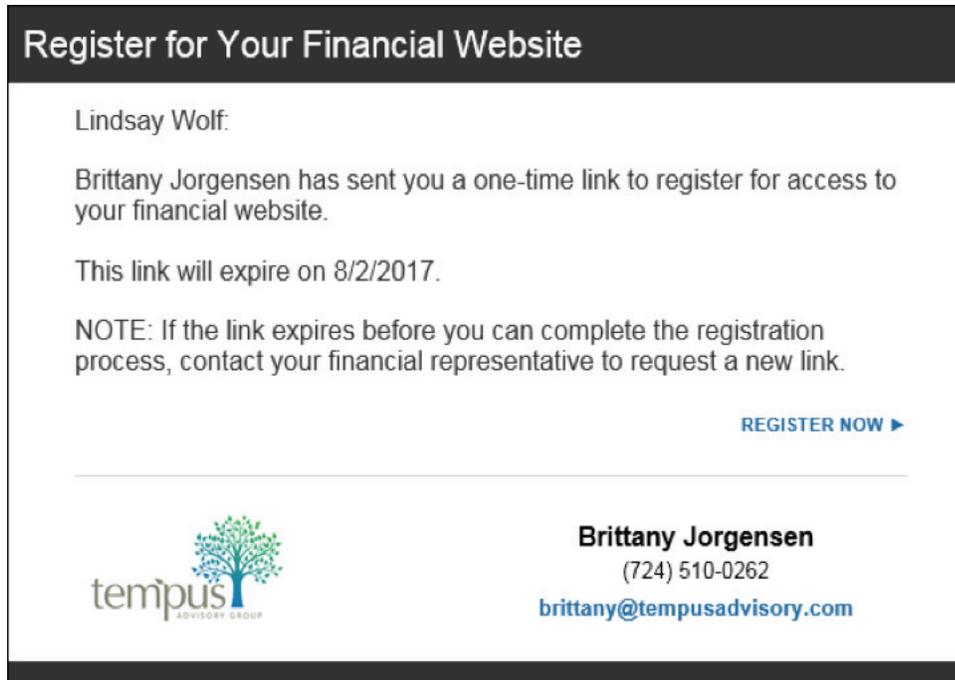
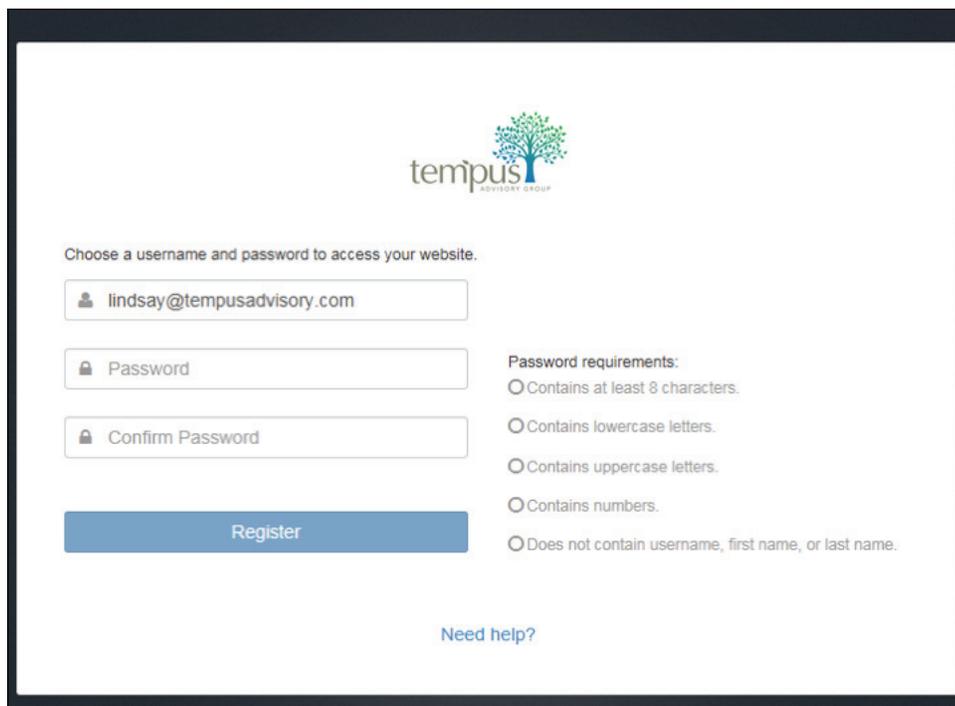


Personal Financial Website Registration

1. You will receive an email from “[Brittany Jorgensen.notification@emoneyadvisor.com](mailto:Brittany.Jorgensen.notification@emoneyadvisor.com)” with the subject line of “Register for Your Financial Website” and the body of the email will look like this:



Your First and Last Name will appear here



2. Click on the “REGISTER NOW” link
3. Your web browser will automatically open a window to this page:

Your email will appear here

4. We recommend keeping your email as the username. Create a new password and confirm, click "Register."
5. After clicking "Register" you will see the following notification:

2-Factor Authentication

Please enroll in 2 Factor Authentication by entering your phone number below.

You will be sent a verification code via text message. To request a phone call, enroll and proceed to the next page.

What phone number would you like to use to receive the verification code?

6. Enter your cell phone number and click "Enroll"
7. After clicking the "Enroll" button, you will receive a text message with a verification code. You will also see the following notification:

Enter Verification Code

We just sent you a text message with a verification code. Enter it to verify your phone.

Please note that text message delivery can take a minute or more.

Can't receive texts or prefer a call? [Call](#)

[Change](#)

Didn't receive a text message? [Resend](#)

8. Enter the verification code you received via text and click on "Verify"
9. After clicking on "Verify" this notification appears (you can enter a second cell phone number if you like or just click on "Skip this for now")

Set Up 2-Factor Recovery Phone

Set up a recovery phone so that you can access the system if you cannot receive verification codes on your primary number. You can choose to skip this now and be reminded in 30 days.

What phone number do you want to use as a recovery phone? Please note this number cannot be the same as your primary 2-factor phone number.

[Skip this for now](#)

10. After clicking on "Skip this for now" you will then be prompted to set three security questions and answers. Write down your questions and answers and keep them handy, because you will need to answer the questions the first time you access your personal financial website after the initial set-up!

Security Questions

You will be asked one of these questions when logging in from a device for the first time or to reset your password if you forget it.

Question 1 of 3

Set a question...

Answer

Confirm Answer

Question 2 of 3

Set a question...

Answer

Confirm Answer

Question 3 of 3

Set a question...

Answer

Confirm Answer

11. After Clicking "Continue" you will see the following notice, please click "I Accept"

Terms of Service

You need to accept this agreement to use the software.

This Terms of Service (this "Agreement") is made by and between eMoney Advisor, LLC, a Delaware limited liability company ("eMoney"), and the consumer customer ("Consumer") of a financial advisor or financial institution who is authorized to use eMoney's Wealth Management System (the "Advisor"). This Agreement sets forth the general terms and conditions of Consumer's access to and use of eMoney's Wealth Management System (the "Service"). Once Consumer accepts by clicking "I Accept" on the Consumer Site (as defined below), Consumer agrees to all of the terms and conditions of this Agreement.

[I Decline](#) [I Accept](#)

12. CONGRATS, you've finished your registration and should see the home page of your personal financial website:

The screenshot shows the home page of a personal financial website for Brittany Jorgensen. The page features a navigation bar with links for Home, Organizer, Workshop, Spending, Investments, Vault, Reports, Help, Settings, and Sign Out. The main content area is divided into several sections:

- FINANCIAL ALERTS**: Includes a "MANAGE ALERTS" button.
- tempus advisory LLC**: User profile for Brittany Jorgensen, with email brittany@tempusadvisory.com and office phone (724) 510-0262. A link for "All Contacts" is also present.
- ACCOUNTS**: A list of account types with a balance of \$0 and a right-pointing arrow: Cash, Credit Cards, Investments, Life Insurance, Loans, and Property. An "+ Add" button is at the top right.
- NET WORTH**: "Add accounts to track your net worth over time." with an "+ Add Accounts" button.
- INVESTMENTS**: "Add investments to track your performance over time and monitor portfolio balances daily." with an "+ Add Investments" button.
- SPENDING**: "Add bank accounts and credit cards to monitor transactions and analyze spending." with an "+ Add Accounts" button.
- BUDGETS**: "Add bank accounts and credit cards to monitor transactions and analyze spending." with an "+ Add Accounts" button.
- PROTECTION**: "Add insurance to have all of your policies in one convenient place." with an "+ Add Insurance" button.
- TOUR GUIDE**: "Get an overview of how to get started with your personal financial website." with a "GET STARTED" button and a small photo of a woman.