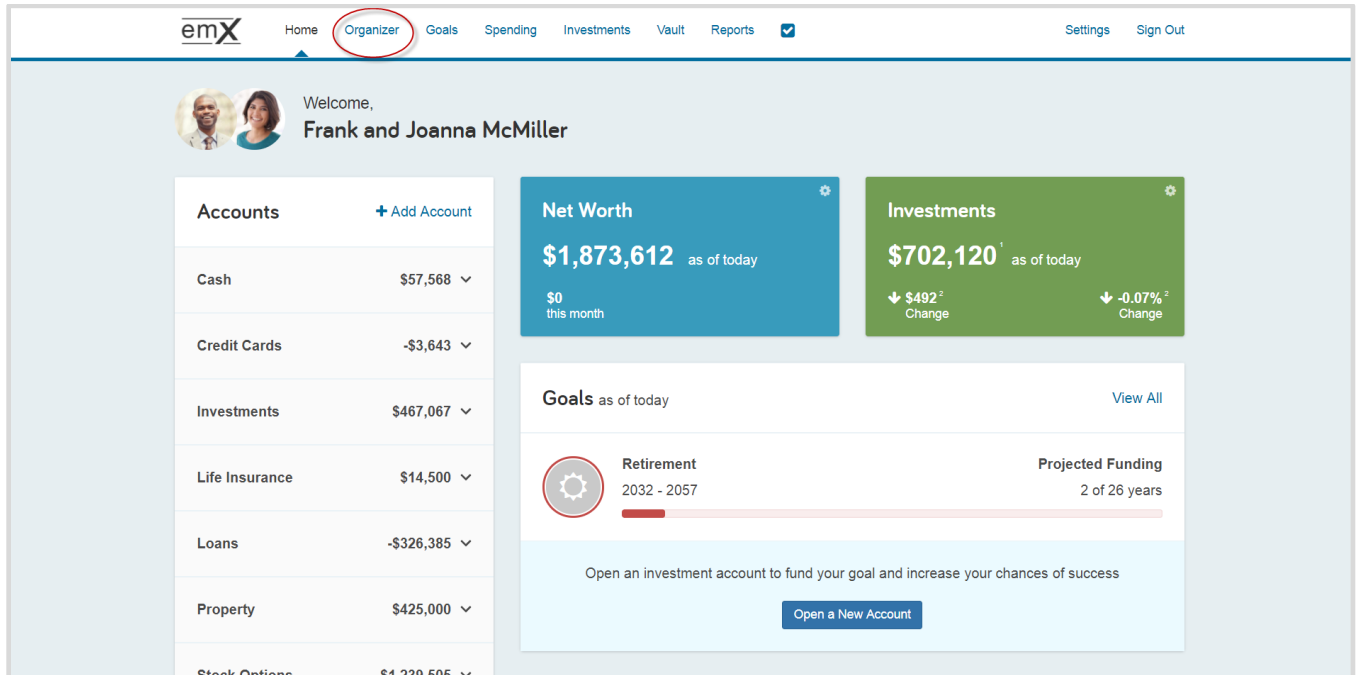


# Organizer Overview

In this guide we will walk you through the features of your Client Site **Organizer**. Use the Organizer to group all 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.



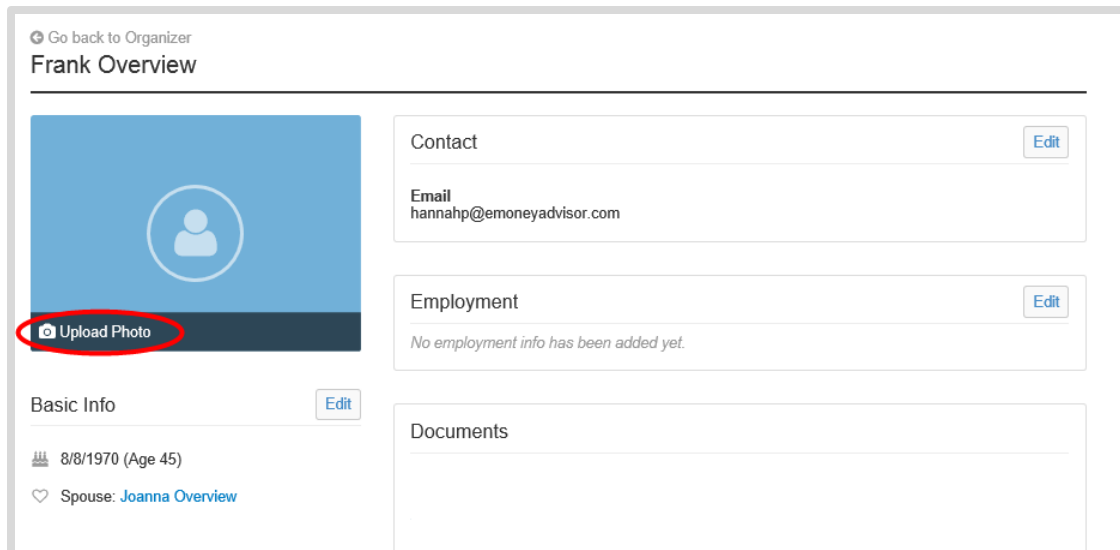
# Organizer Overview

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

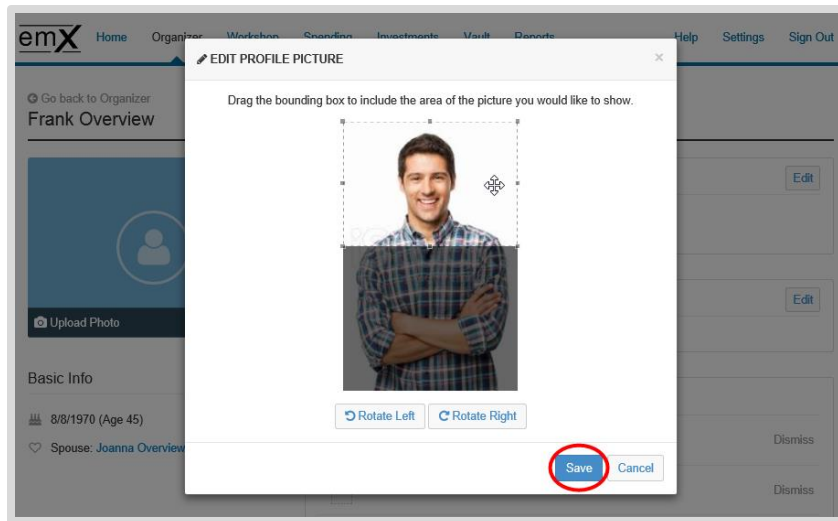
The screenshot displays a personal financial website interface. At the top, there are two profile cards for Frank Miller (FM) and Joanna Miller (JM). Frank Miller's profile includes options to 'Add Phone', an email address 'hannahp@emoneyadvisor.com', a birth date of '6/1/1964', and an 'Add Employment' button. Joanna Miller's profile includes options to 'Add Phone', 'Add Email', a birth date of '3/20/1965', and an 'Add Employment' button. On the left side, a navigation menu lists categories: Accounts, Professional Contacts, Income, Expenses, and Savings, Future Goals, Financial Priorities, and Risk Tolerance. Below the profiles, there are two main sections: 'People' and 'Property'. The 'People' section features five circular icons representing individuals: Peter (PM), Mary Beth (MM), Lucas (LM), Elaine (EG), and Stephanie (SM). An 'Add Person' button is circled in red in the top right of this section. The 'Property' section features four colored boxes representing assets: 'Cars' (purple with a diamond icon), 'Home' (green with a house icon), 'Jewelry' (purple with a diamond icon), and 'Vacation Mountain Home' (green with a house icon). An 'Add Property' button is circled in red in the top right of this section.

# Organizer Overview

3. 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.



# Organizer Overview




# Organizer Overview

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

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**Contact** [Edit](#)


**Email**  
hannahp@emoneyadvisor.com

**Employment** [Edit](#)

*No employment info has been added yet.*

**Basic Info** [Edit](#)

 8/8/1970 (Age 45)

 Spouse: [Joanna Overview](#)

**Documents**

### Please Note:

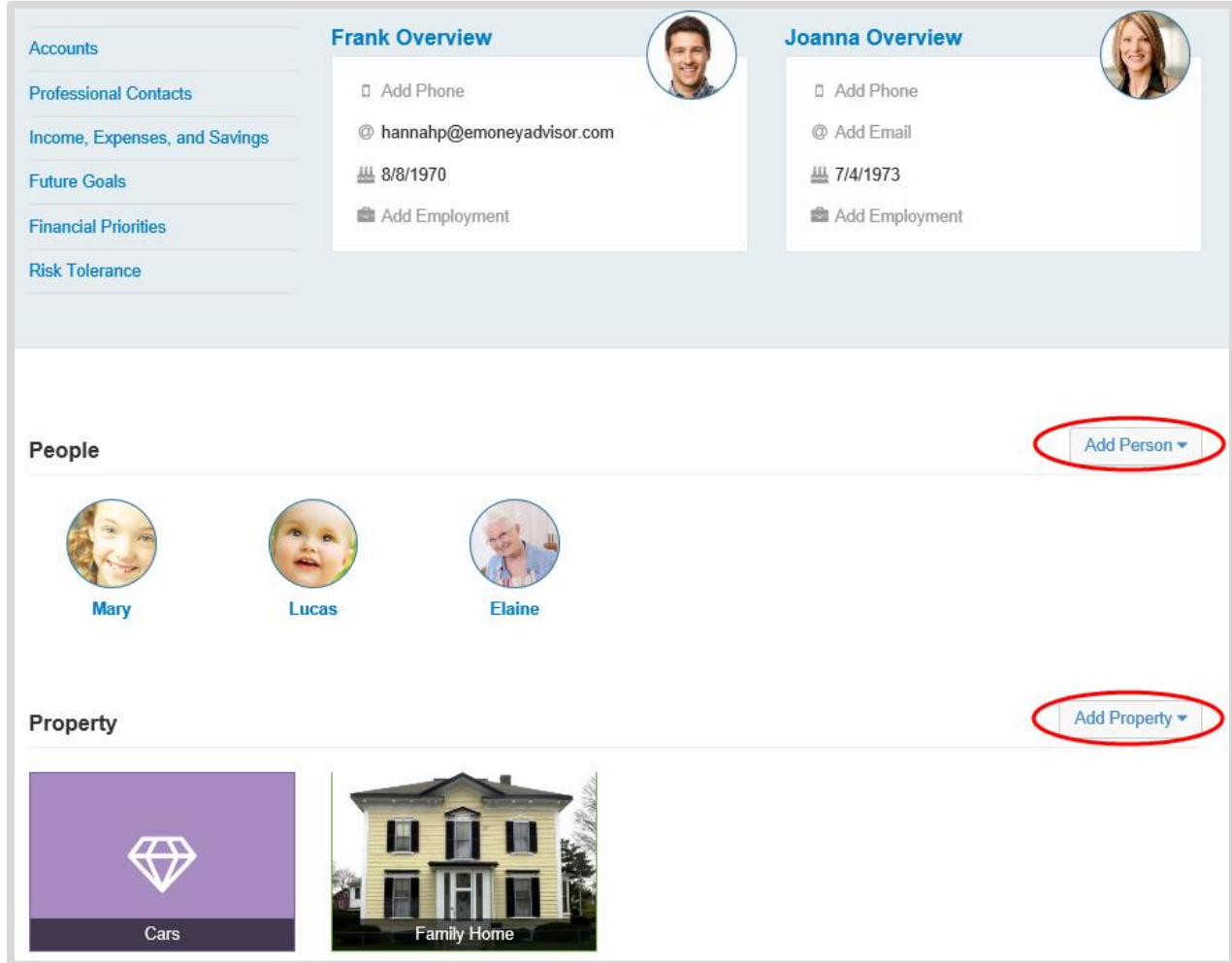
**Basic Info:** First & Last name, DOB, Gender, Special Needs, In Good Health, and Marital Status

**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.

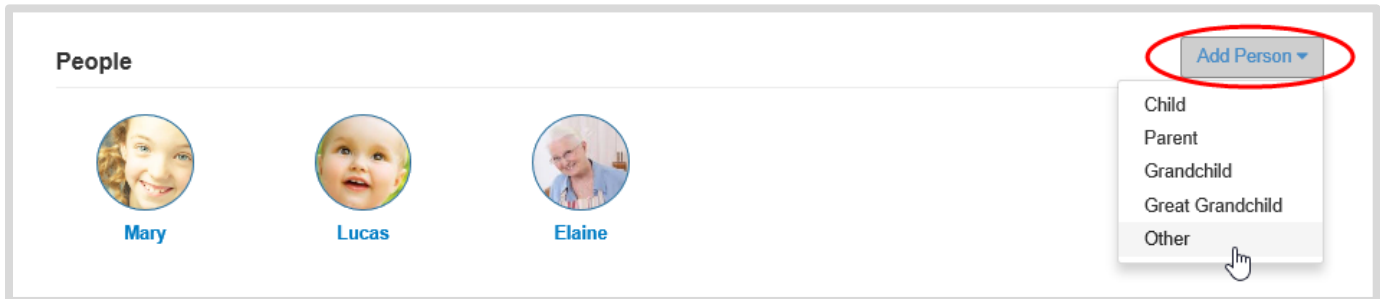
**Employment Info:** Employer Name, Job Title, Email

# Organizer Overview

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

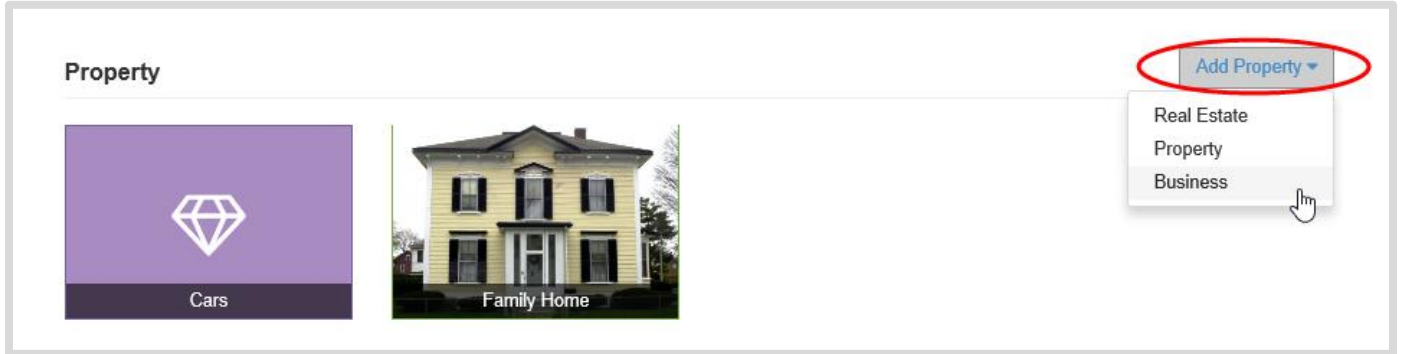


6. To add a person, click **Add Person** and choose what to add & enter details. You can upload a picture of each person on their individual page.

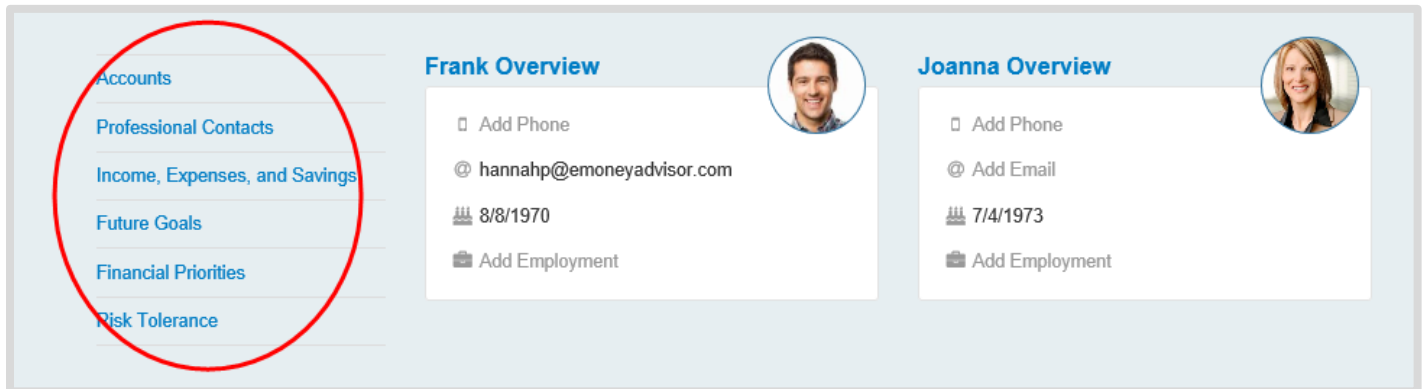


# Organizer Overview

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.



# Organizer Overview

**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.

**Risk Tolerance:** used to define how much risk you are willing to accept. You can make changes to their answers at any time.



# Organizer Overview

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.

The screenshot shows a web interface for a 'Taxable Investment' entry. At the top left, there is a link 'Go back to Accounts'. The main title is 'Taxable Investment'. Below this is a form with several fields: 'Asset Name' (Taxable Investment), 'Institution Name' (empty), 'Owner' (Frank and Joanna (Joint/ROS) with an '+ Add' button), 'Total Value' (\$85,000), 'Holdings Value' (empty), 'Cash Balance' (empty), 'Margin Balance' (empty), and 'Tax Basis' (empty). At the bottom right of the form are 'Save' and 'Cancel' buttons. To the right of the form is a sidebar with a 'View Holdings' button and a 'View' section containing 'Investment Summary', 'Asset Allocation', and 'Investment Transactions'. Below the sidebar is a 'Delete this Account' button with a red 'X' icon. At the bottom of the page, there is a 'Documents' section with a red circle around the 'Add Other' button, which has a green plus icon and a dropdown arrow. Below this button is the text 'View dismissed suggestions'.


# Organizer Overview

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
 <a href="#">Ben Alliance</a>	Alliance Partner	<a href="mailto:hannahp@emoneyadvisor.com">hannahp@emoneyadvisor.com</a>	(888) 362-8482 
 <a href="#">Joe Murphy</a>	CPA	<a href="mailto:joemurphy@nomail.com">joemurphy@nomail.com</a>	(888) 362-8482 

# Organizer Overview

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

**Income, Expenses, and Savings**

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Annual Income [Add](#)

Income	Value
Frank's Salary	\$90,000 <span style="color: red;">✕</span>
Joanna's Salary	\$65,000 <span style="color: red;">✕</span>

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**

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**Retirement**

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

**Education Expenses** [Add](#)

Lucas College	\$37,318 <span style="color: red;">✕</span>
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**Major Expenses** [Add](#)

Addition to House	\$80,000 <span style="color: red;">✕</span>
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# Organizer Overview

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.

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

14. Risk Tolerance provides a 12 question questionnaire. You will need to answer all 12 questions in full to see your risk score.

