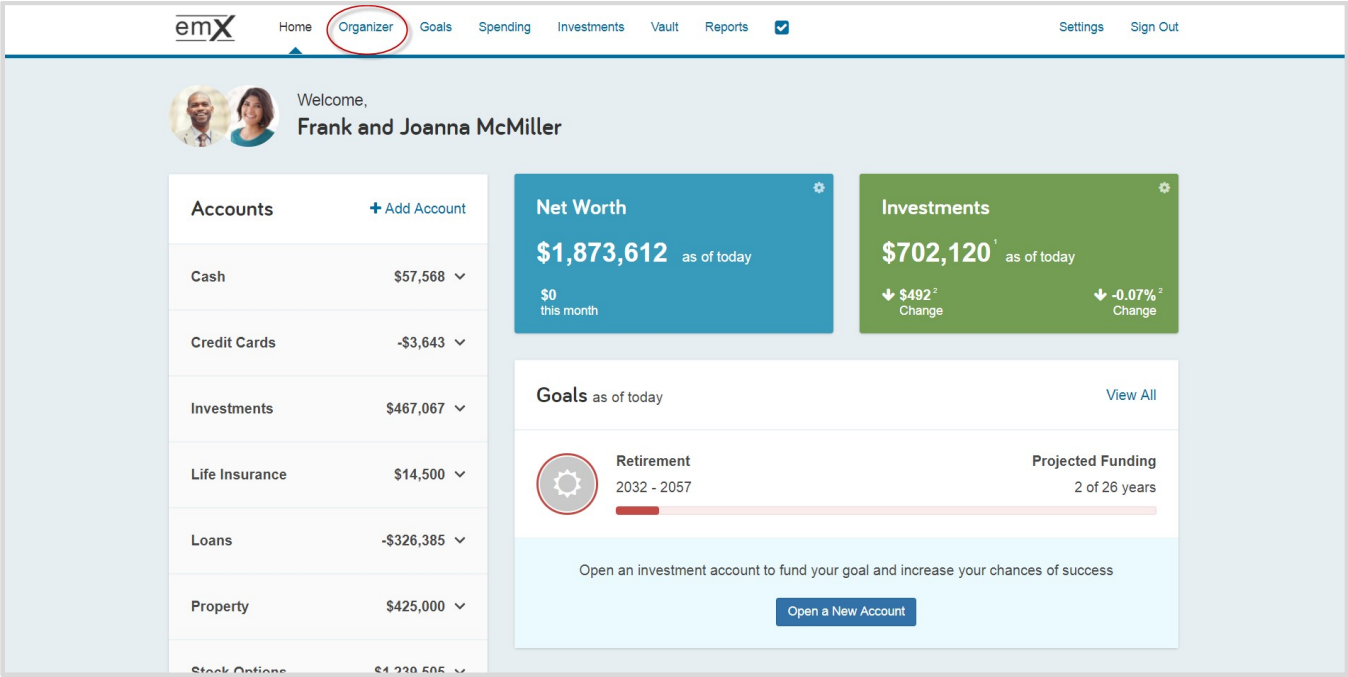


# Organizer Overview

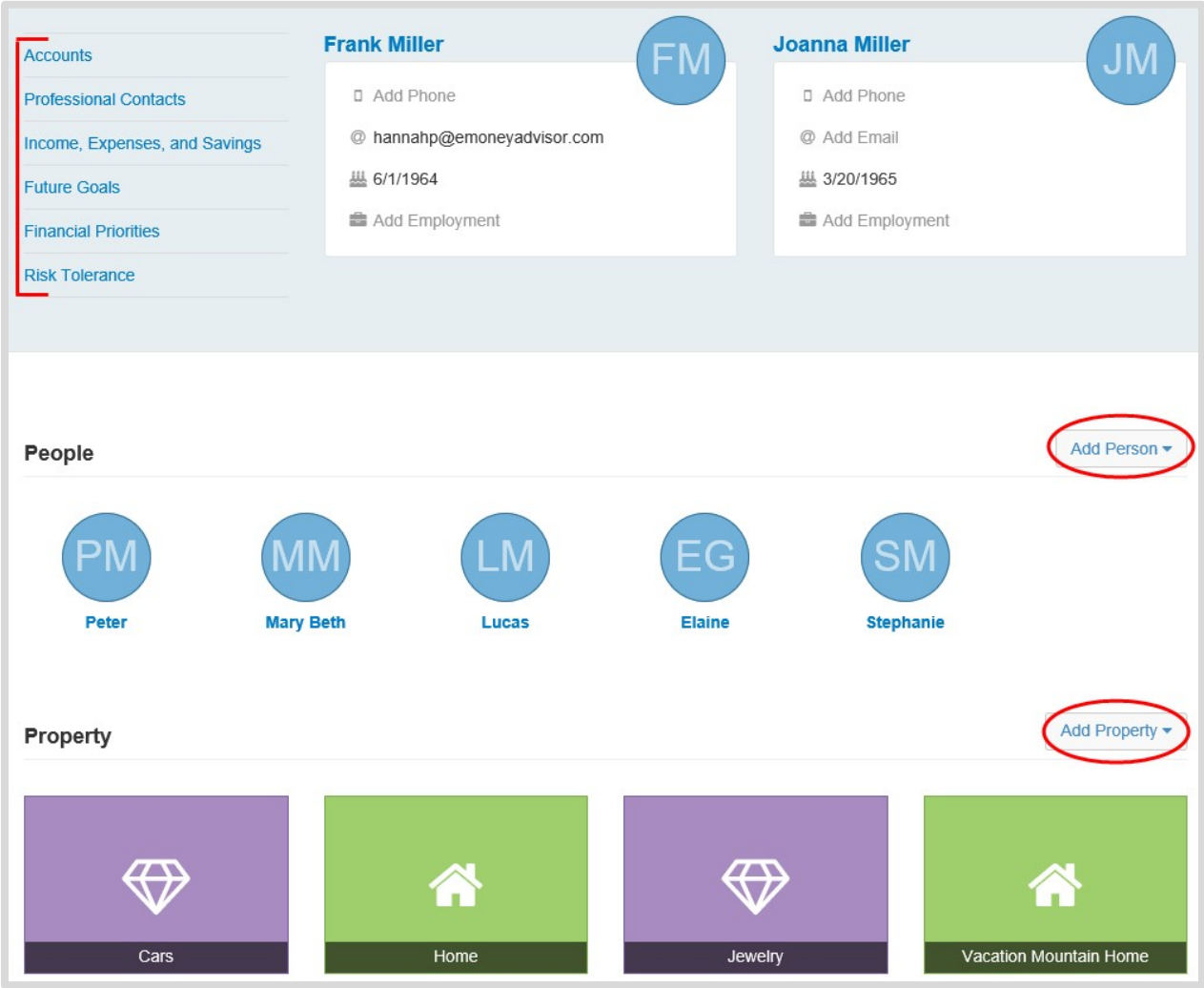
In this guide we will walk you through the features of your Client Site **Organizer**. Use the Organizer to group all your financial information in one place. Click the different sections to add and edit the related information. The information included here will be used to populate other areas of the application, including the Home page.

1. To access the organizer, click the **Organizer** tab from the features bar.



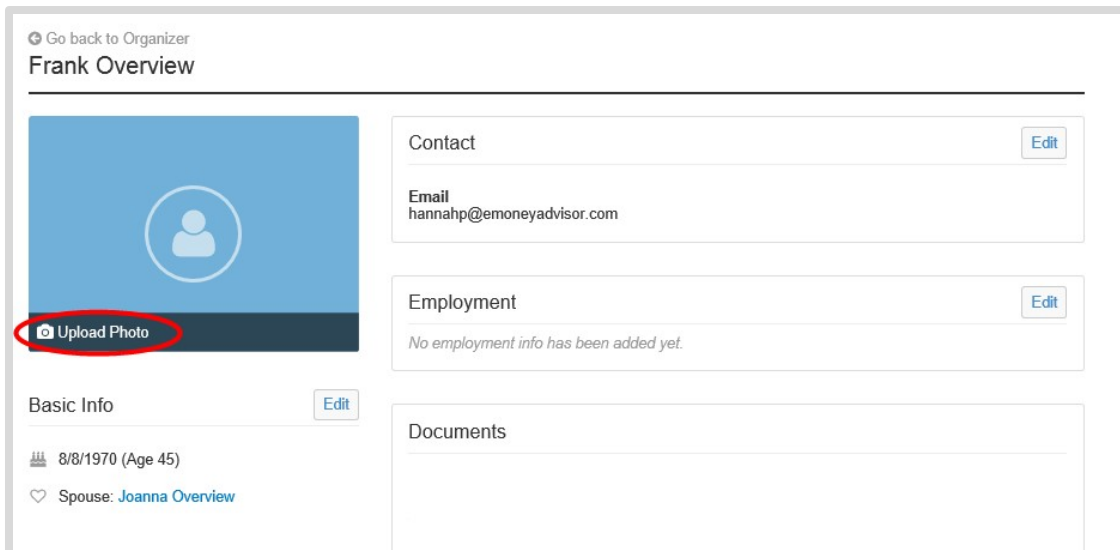
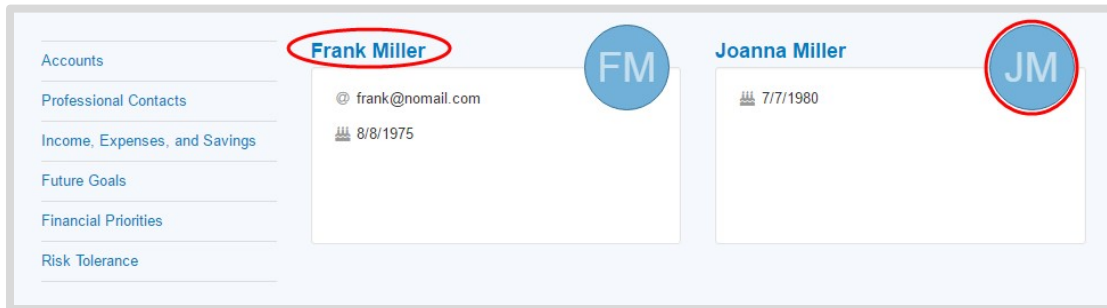
# Organizer Overview

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

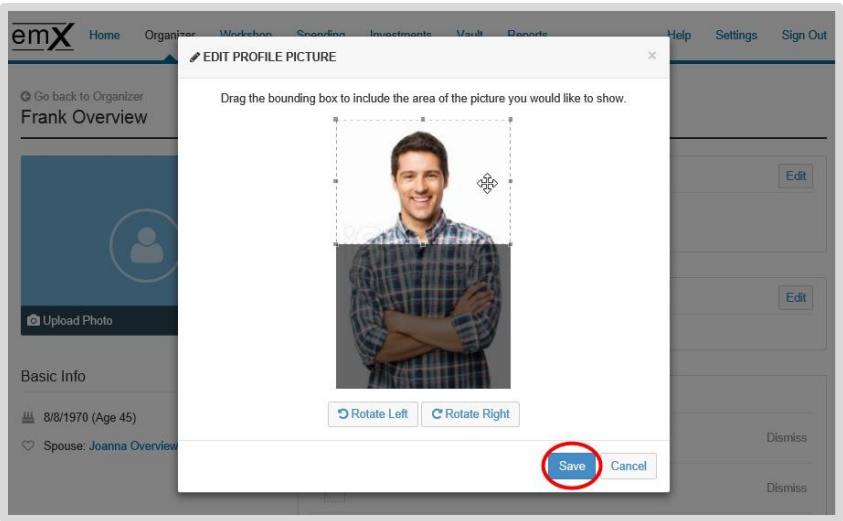


# Organizer Overview

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**



**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:

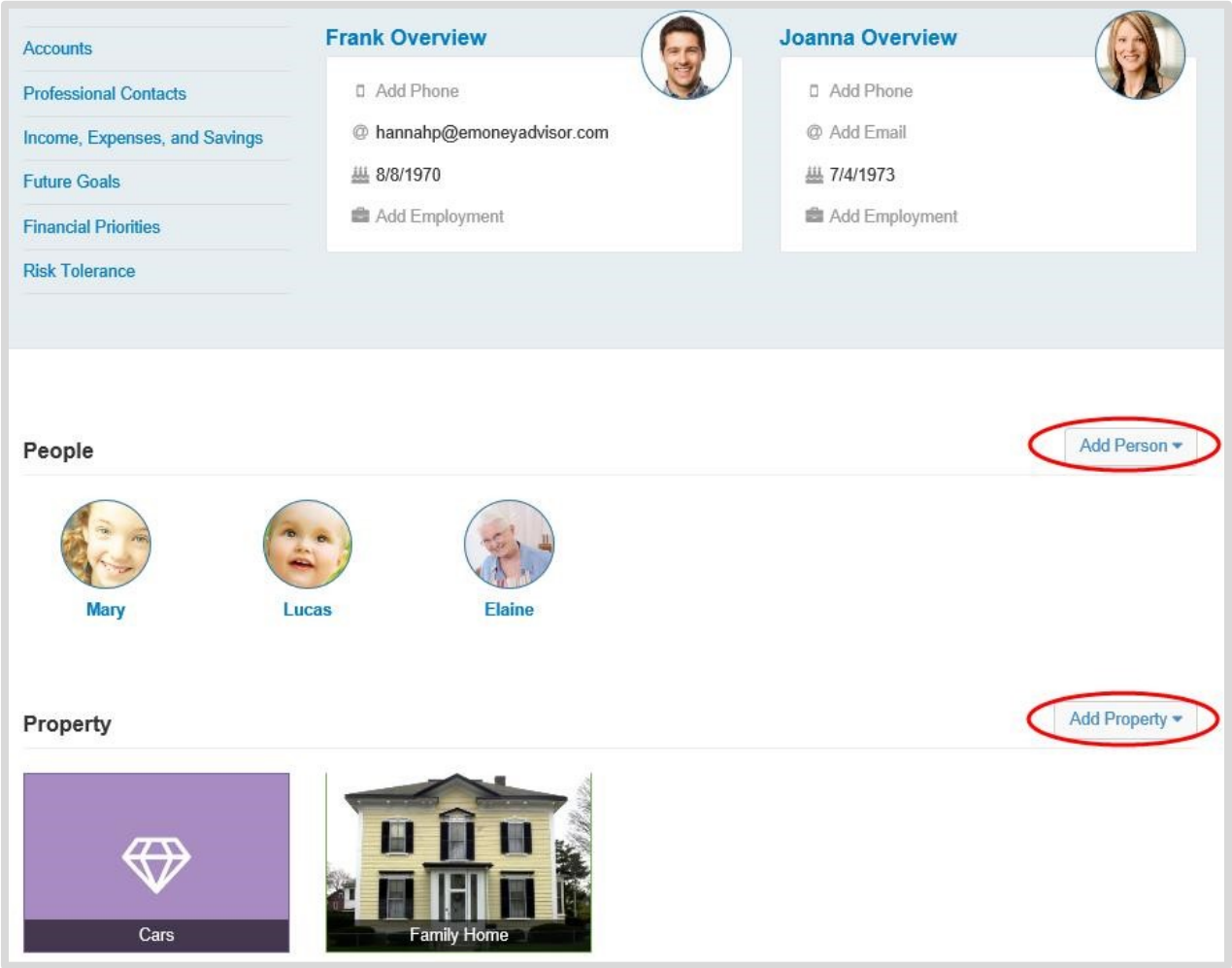
**Basic Info:** First & Last name, DOB, Gender, Special Needs, In Good Health, and Marital Status

**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.

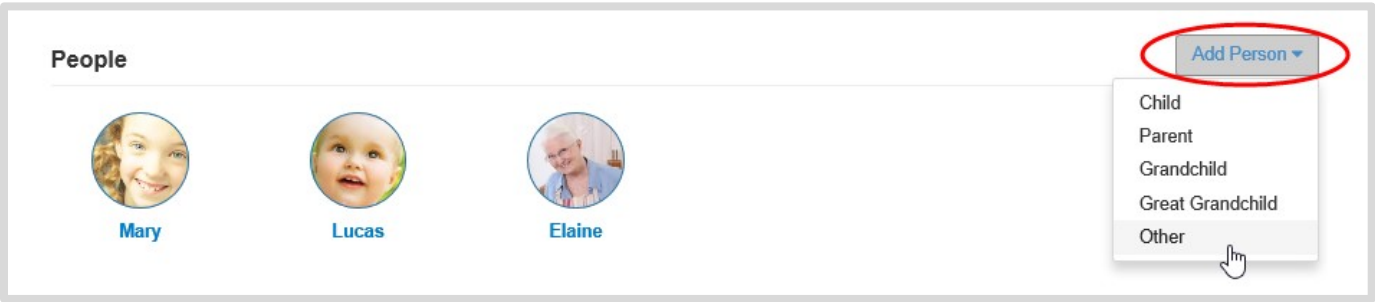
**Employment Info:** Employer Name, Job Title, Email

# Organizer Overview

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

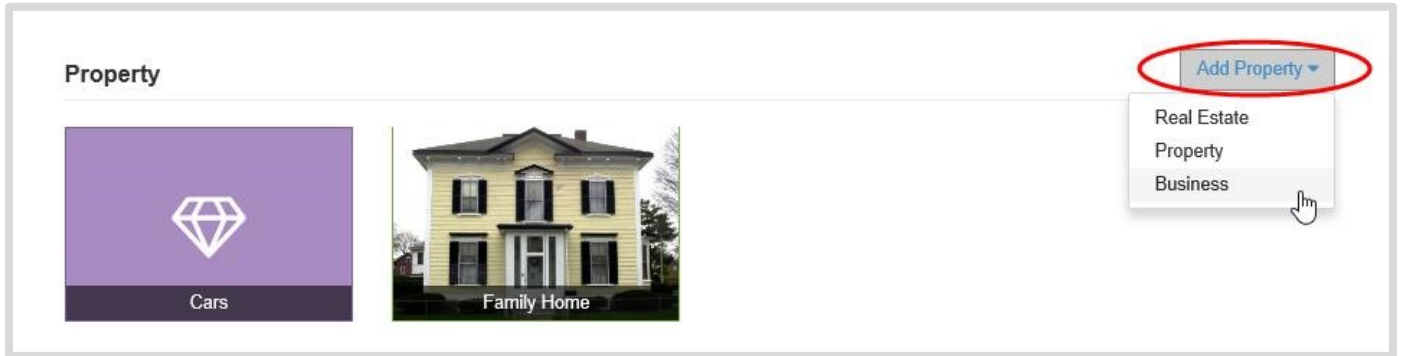


6. To add a person, click **Add Person** and choose what to add & enter details. You can upload a picture of each person on their individual page.

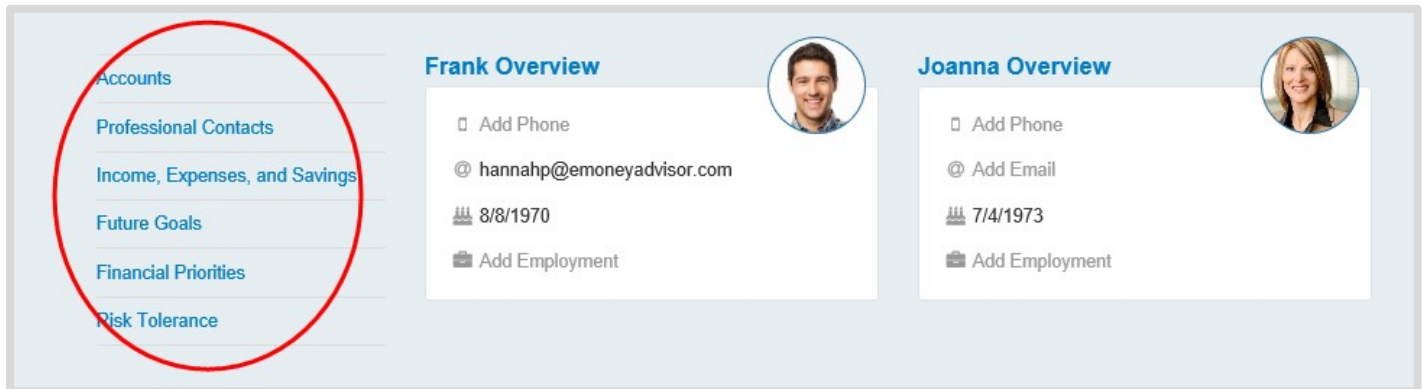


# Organizer Overview

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.

[Go back to Accounts](#)  
**Taxable Investment**

Taxable Investment

Asset Name: Taxable Investment

Institution Name:

Owner: Frank and Joanna (Joint/ROS) [+ Add](#)

Total Value: \$85,000

Holdings Value:

Cash Balance:

Margin Balance:

Tax Basis:

[Save](#) [Cancel](#)

[▶ View Holdings](#)  
**View**  
[▶ Investment Summary](#)  
[▶ Asset Allocation](#)  
[▶ Investment Transactions](#)  
[✖ Delete this Account](#)

**Documents**

[+ Add Other](#)


[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



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
<div><div>BA</div><div>Ben Alliance</div></div>	Alliance Partner	<a href="mailto:hannahp@emoneyadvisor.com">hannahp@emoneyadvisor.com</a>	(888) 362-8482 
<div><div>JM</div><div>Joe Murphy</div></div>	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

Annual Income

Add

Income	Value
Frank's Salary	\$90,000 <div>X</div>
Joanna's Salary	\$65,000 <div>X</div>

Annual Living Expenses

Add Itemized

Annual Living Expenses

\$65,000

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

Retirement

Frank's retirement age

62

Joanna's retirement age

65

Education Expenses

Add

Lucas College

\$37,318 

X

Major Expenses

Add

Addition to House

\$80,000 

X

# 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

Saving for College

1

Planning for Retirement

2

Managing a Budget

3

Providing a Legacy

4

5

6

Joanna

Change

Insuring Your Life

1

Creating Retirement Income

2

Saving for College

3

Contributing to Charity

4

Providing a Legacy

5

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.

Your Risk Score

CONSERVATIVE

MODERATE

AGGRESSIVE

12 | Organizer Overview