

Setting Alerts

This training guide will demonstrate how to set up alerts around your financials tied in to your personal financial management site!

Please Note: Your advisor has the ability to customize which alerts are available to you on your website.

1. From your Home page, click Settings.

The screenshot shows the eMoney Advisor website dashboard. At the top, there is a navigation bar with the following items: Home, Organizer, Workshop, Spending, Investments, Vault, Reports, Help, **Settings** (circled in red), and Sign Out. Below the navigation bar, the dashboard is divided into several sections:

- FINANCIAL ALERTS** (top left header)
- MANAGE ALERTS** (top right header)
- ACCOUNTS**: A list of account types with their current balances:

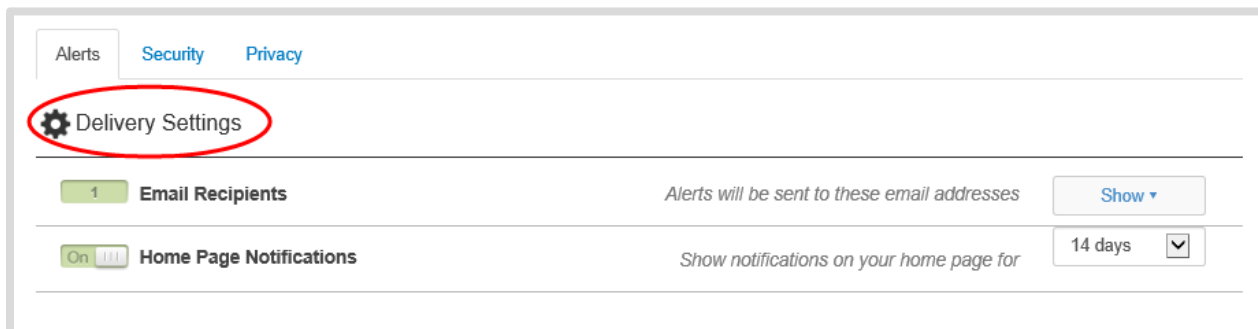
Cash	\$7,568
Credit Cards	-\$2,368
Investments	\$186,067
Life Insurance	\$14,500
Loans	-\$426,385
Property	\$1,080,000
Stock Options	\$1,239,505
- NET WORTH**: TODAY **\$2,098,887**. THIS MONTH: --
- INVESTMENTS**: TODAY **\$268,171**. CHANGE²: **+\$737.99** (+0.28%)
- SPENDING**: NET **-\$613**. You've spent \$613 this month. A pie chart shows spending categories: Taxes (blue), Cash/ATM (green), and Business (yellow).
- BUDGETS**: UNDER **\$4,768**. 21 days remaining this month. A progress bar shows \$253 spent out of \$5,021, with a callout for May 10.
- PROTECTION**: Variable Universal Life \$1,000,000. eMoney Advisor Source (E...)
- TOUR GUIDE**: Get an overview of how to get started with your personal financial website. **GET STARTED** button and a photo of a woman.

Setting Alerts

- The Delivery Settings allow you to permission alerts being sent to an email and if you want to be notified on your home page that an alert has been triggered.

To add an email recipient, click the **Add/Show** drop down and enter in the recipients email. Click the Plus sign when complete.

Toggling **ON** Home Page Notifications allows you to see triggered alerts for a set number of days before they expire.



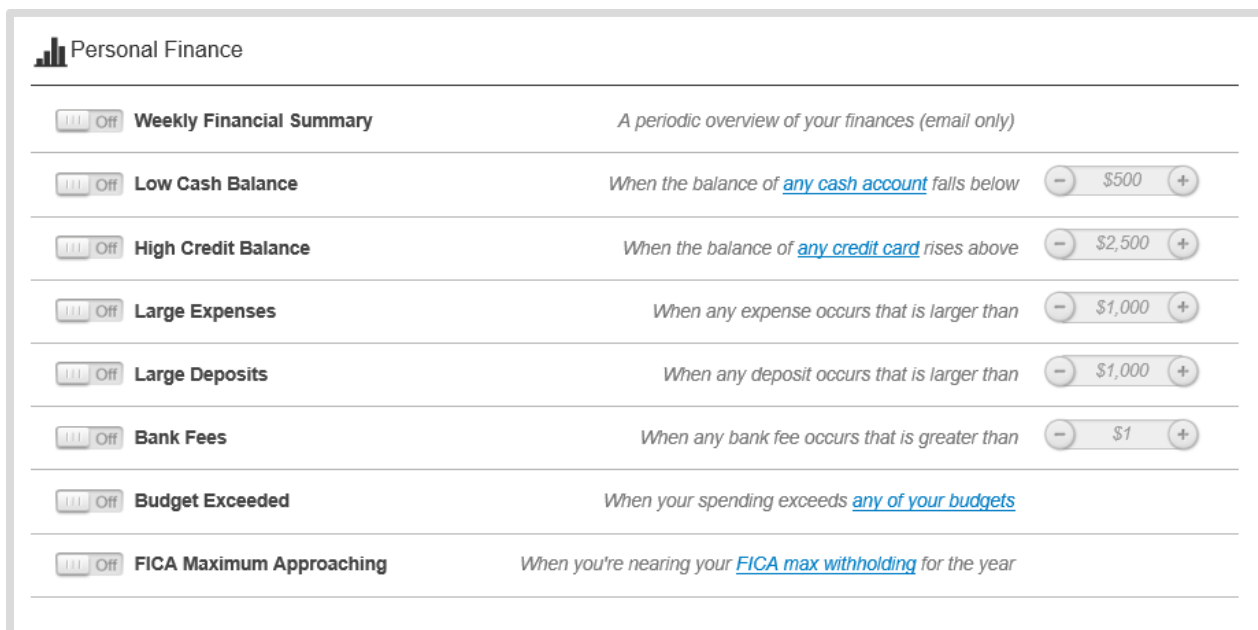
Alerts Security Privacy

Delivery Settings

1 Email Recipients Alerts will be sent to these email addresses [Show](#)

On Home Page Notifications Show notifications on your home page for 14 days

- Personal Financial Alerts allow you to set up notifications for things relevant to your financials – these alerts are tied to the spending information brought over through Accounts. To add accounts directly from a financial institution, please refer to the Adding Accounts user guide.



Personal Finance

Off **Weekly Financial Summary** A periodic overview of your finances (email only)

Off **Low Cash Balance** When the balance of [any cash account](#) falls below

Off **High Credit Balance** When the balance of [any credit card](#) rises above

Off **Large Expenses** When any expense occurs that is larger than


Off **Large Deposits** When any deposit occurs that is larger than

Off **Bank Fees** When any bank fee occurs that is greater than

Off **Budget Exceeded** When your spending exceeds [any of your budgets](#)

Off **FICA Maximum Approaching** When you're nearing your [FICA max withholding](#) for the year

4. Investments alerts are relating to the underlying investment holdings in your portfolio.

 Investments

Off **Investment Activity** *When specific types of [investment transactions](#) occur*


Off **Unbalanced Portfolio** *When your investment portfolio is out of balance [by more than](#):*

Off **Concentrated Position** *When a stock or bond makes up [more than this much](#) of your portfolio:*

Off **Excess Cash Position** *When cash makes up [more than this much](#) of your portfolio:*

Off **Security Prices** *[Monitor the prices](#) of stocks and mutual funds*

5. Reminders are date based alerts.

 Reminders

Off **End of Year Planning** *Annual financial housekeeping tips*

Off **Insurance Policy Anniversary** *Annual reminder of policy renewal date*

Off **Tax Filing Dates** *When tax filing dates are approaching*

Off **Frank's Social Security Benefits** *[When Frank is approaching age](#)*

Off **Joanna's Social Security Benefits** *[When Joanna is approaching age](#)*

Off **Required Minimum Distributions** *Annual reminder to meet your [RMD requirements](#)*

Off **Important Dates** *Birthdays, anniversaries, or any other date you want to remember*