SIGNATUREFD

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FINANCIAL DESIGN CENTER OVERVIEW

This training guide will provide an overview of the Financial Design Center. The Financial Design Center is a personal financial website that will provide you with a consolidated view of your financial information.

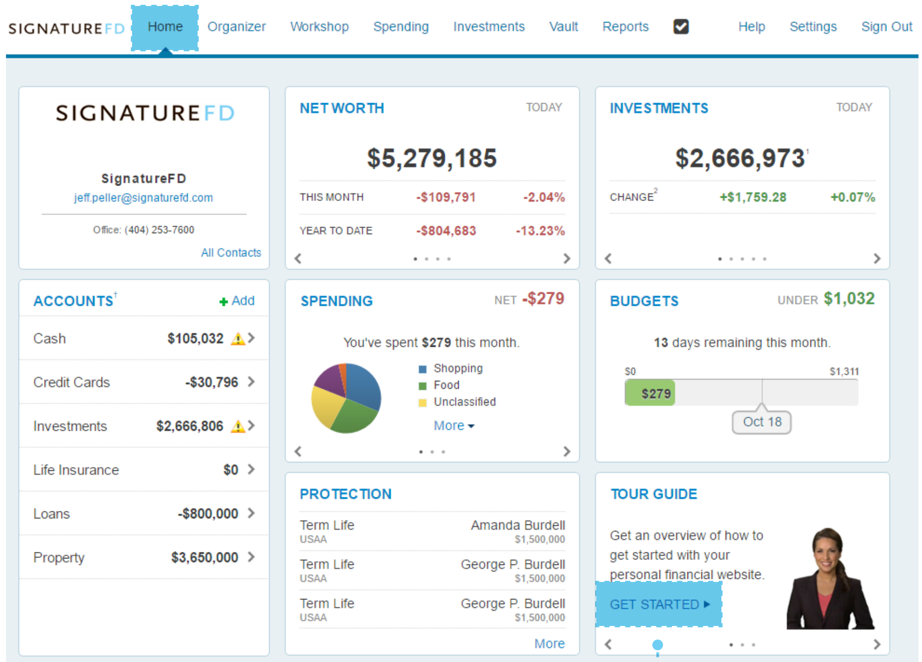
Go to **wealth.emaplan.com/ema/Default.aspx?ema/ria/signaturefd.** There are many features, such as the Organizer, Reports and Vault (an online safe-deposit box that stores digital copies of valuable personal documents such as wills, trusts, passport information and photos).

Note: You will need to establish three security questions the first time you log on. Each subsequent logon will prompt you for an answer to one of the questions unless the following box is checked:

☐ Don't ask me again from this device

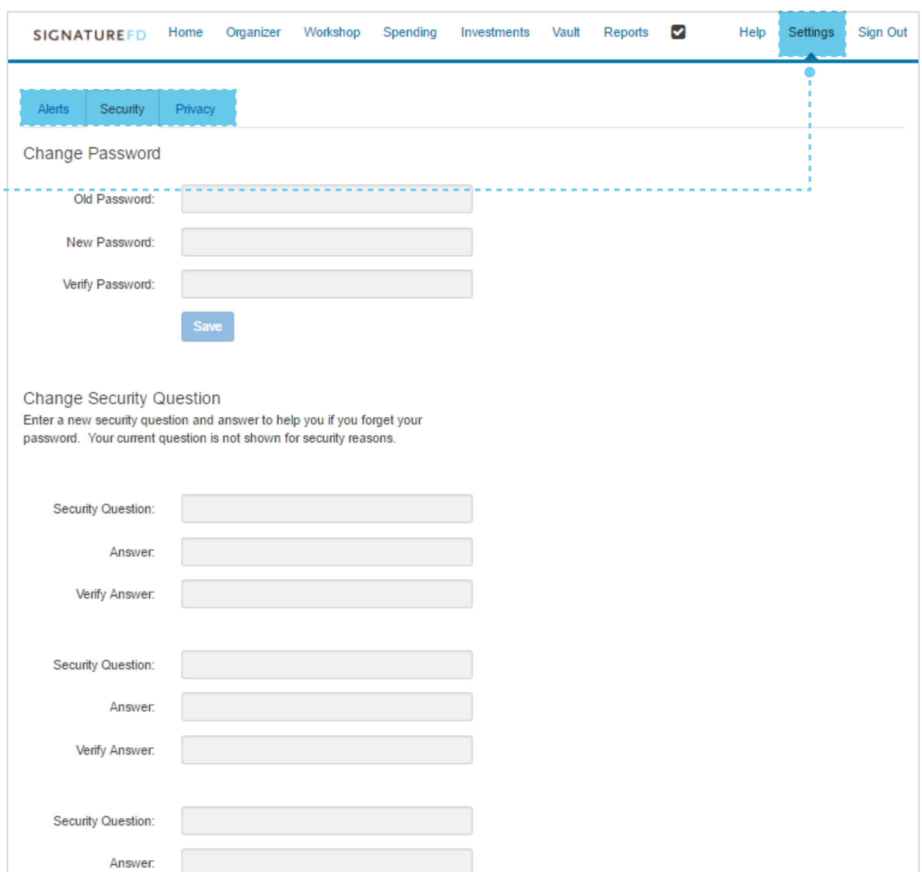
1. Home Page

At the bottom right-hand side of the **Home** page, click the **Get Started** link under Tour Guide for help navigating the site.



2. Settings

Click **Settings** to set alerts, security and privacy settings.



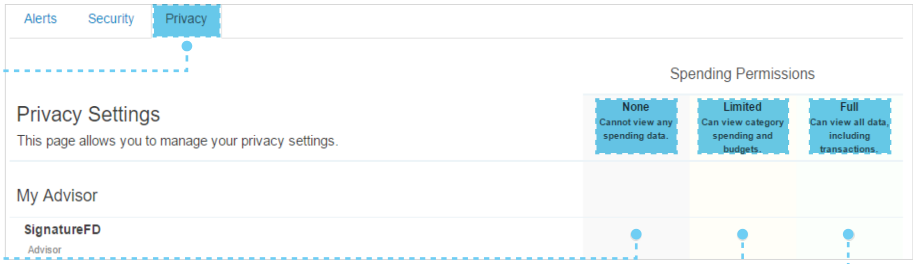
3. Privacy

The **Privacy** tab allows control of the advisor's access to your spending data.

None: The advisor will not have access to any spending data.

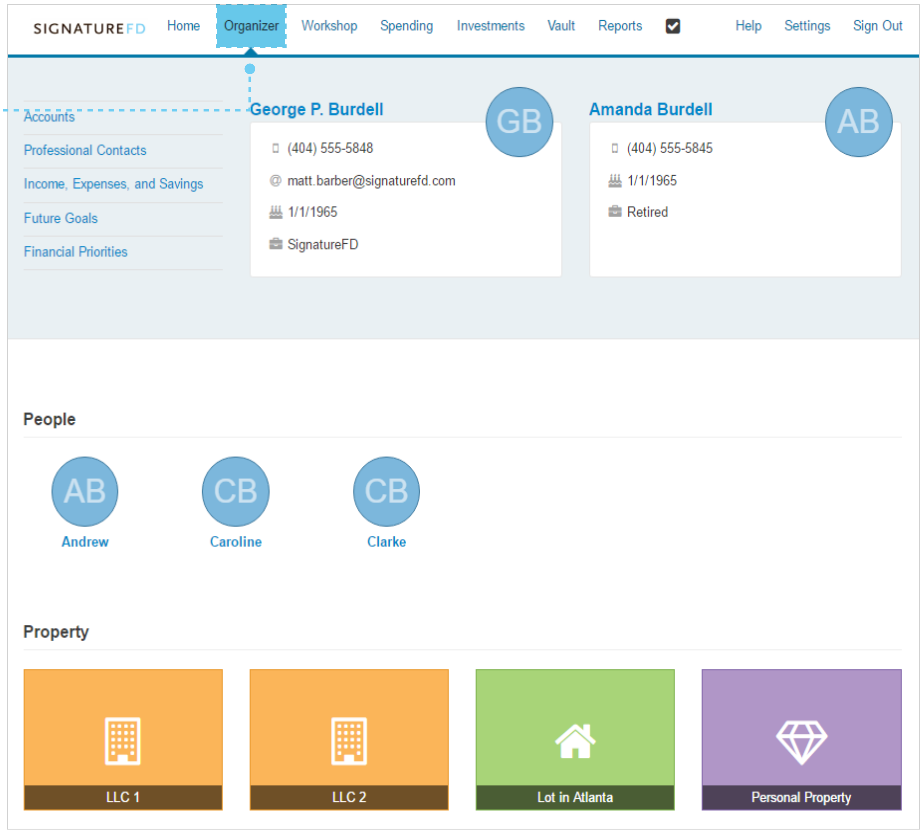
Limited: The advisor will have limited access to spending details and can view only the categories regarding spending and budget, *not* individual transactions.

Full access: The advisor can view all spending and budgeting items, *Including* transactions.



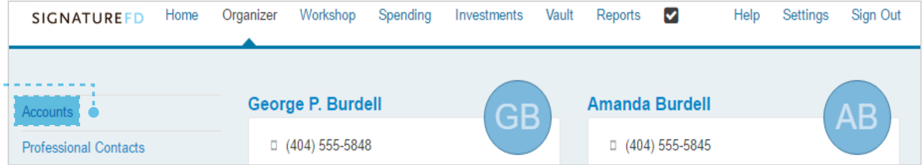
4. Organizer

The **Organizer** is a place to enter your data such as accounts, property, income and expenses. We have already input most of your data, but we would like you to input outside accounts so that we have access to up-to-date information. This will allow you to view your entire financial picture whenever you want to. It also allows your financial advisor to run reports based on your most current financial information.



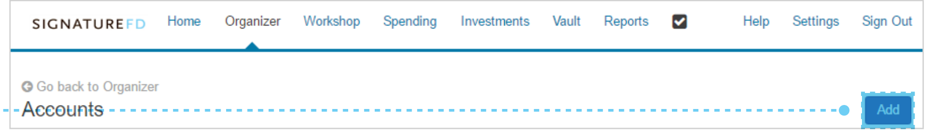
5. Accounts

To add accounts to the Organizer, click **Accounts**.



6. Add

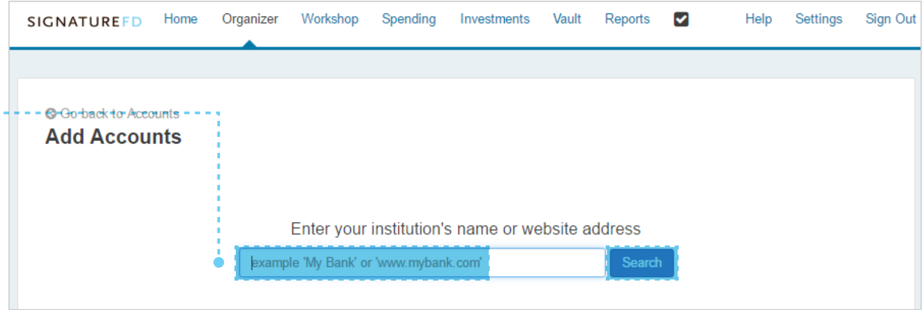
Click the **Add** button to search for a specific institution.



7. Search

Type in the name of the institution where you have accounts, and click **Search**.

Note: There must be an online account set up at the institution in order to connect it and bring the current value into the Organizer. If you do not see your institution, let us know and we can request that it be added to the system.



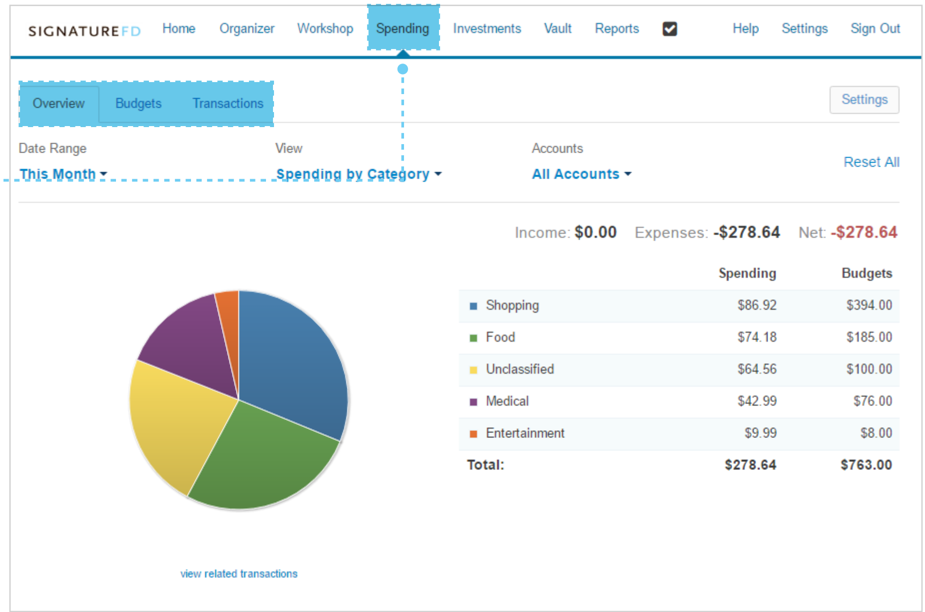
8. Spending

The **Spending** tab allows you to track your spending habits and build a custom budget.

a. The **Overview** tab provides a pie chart based on recent transactions imported from aggregated accounts.

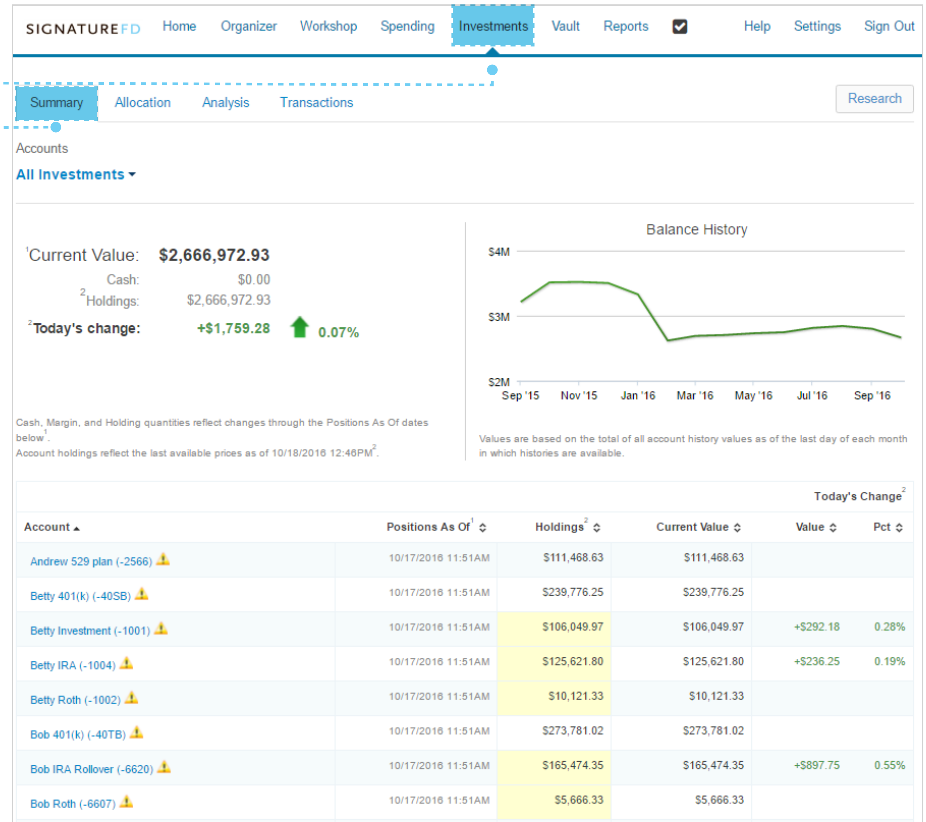
b. The **Budgets** window is a snapshot that allows you to monitor if you are on track with your monthly budget.

c. The **Transactions** tab shows transactions pulled in from connected accounts.



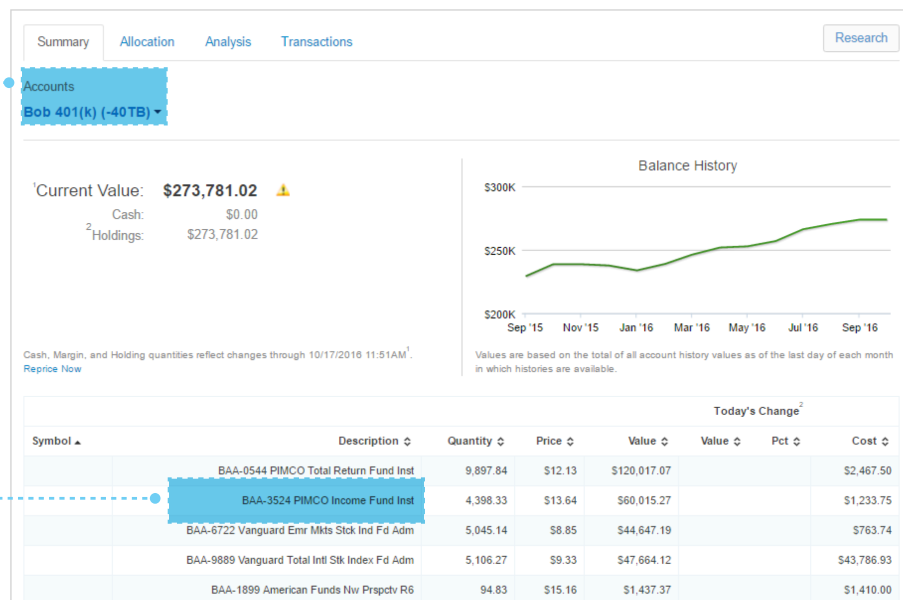
9. Investments

The **Investments** tab allows you to view up-to-date market information based on connected investments.



10. Account Details

Click on the account name under **Accounts** to see a holdings breakdown of any given account. You can also click on specific holdings to view additional information on each investment.



11. Vault

The **Vault** provides secure storage for valuable personal documents (wills, trusts, insurance documents, passports, etc.) in electronic format.

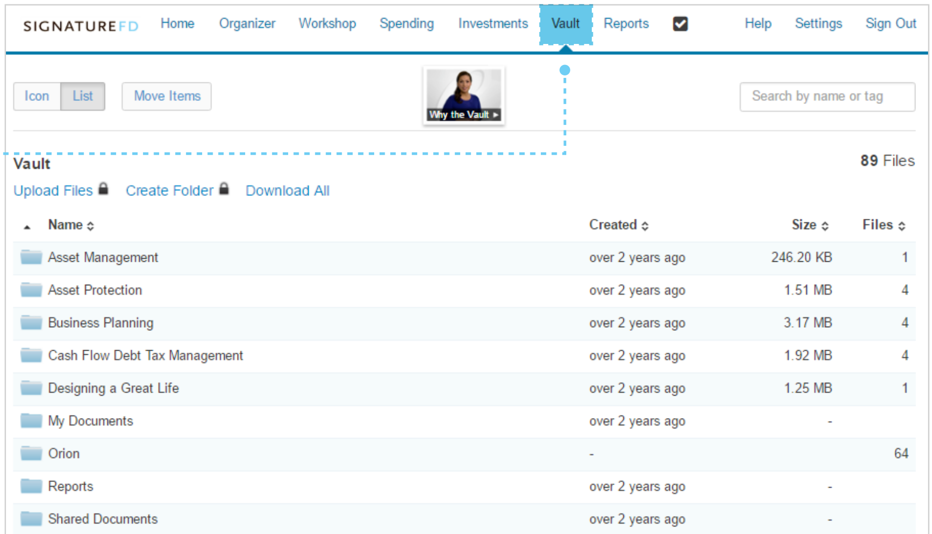
a. You can upload documents into the **Shared Documents** folder, allowing the advisor to also view the contents.

b. You can upload documents into the **My Documents** folder, which is a private folder where only you can access the contents.

c. We will upload documents that we have access to, such as tax returns and estate planning documents, into the appropriate folders.

d. The **Orion** folder will include your performance reports and tax documents.

Note: The Vault allows files with the following extensions: .aifc, .aiff, .aif, .au, .avi, .bmp, .doc, .gif, .jpg, .jpeg, .mov, .mp3, .mpeg, .mpg, .pdf, .png, .ppt, .ps, .rtf, .snd, .swf, .tax, .tif, .tiff, .txt, .wav, .wma, .wmv, .wps, .xls and xml.

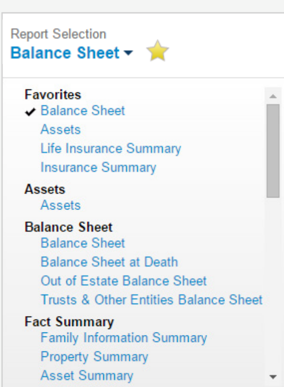


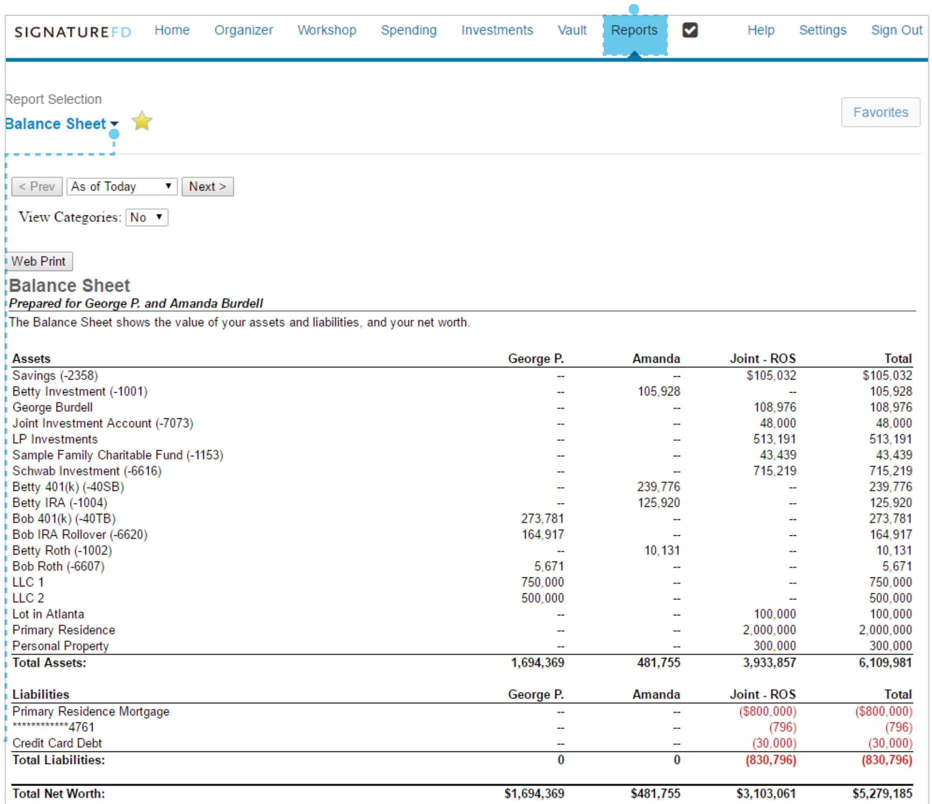
Name	Created	Size	Files
Asset Management	over 2 years ago	246.20 KB	1
Asset Protection	over 2 years ago	1.51 MB	4
Business Planning	over 2 years ago	3.17 MB	4
Cash Flow Debt Tax Management	over 2 years ago	1.92 MB	4
Designing a Great Life	over 2 years ago	1.25 MB	1
My Documents	over 2 years ago	-	
Orion	-		64
Reports	over 2 years ago	-	
Shared Documents	over 2 years ago	-	

12. Reports

The **Reports** tab provides a series of statements about your financial situation, with all data from linked accounts updated daily.

To view a report, simply choose from the drop-down list located under **Report Selection**.





Balance Sheet

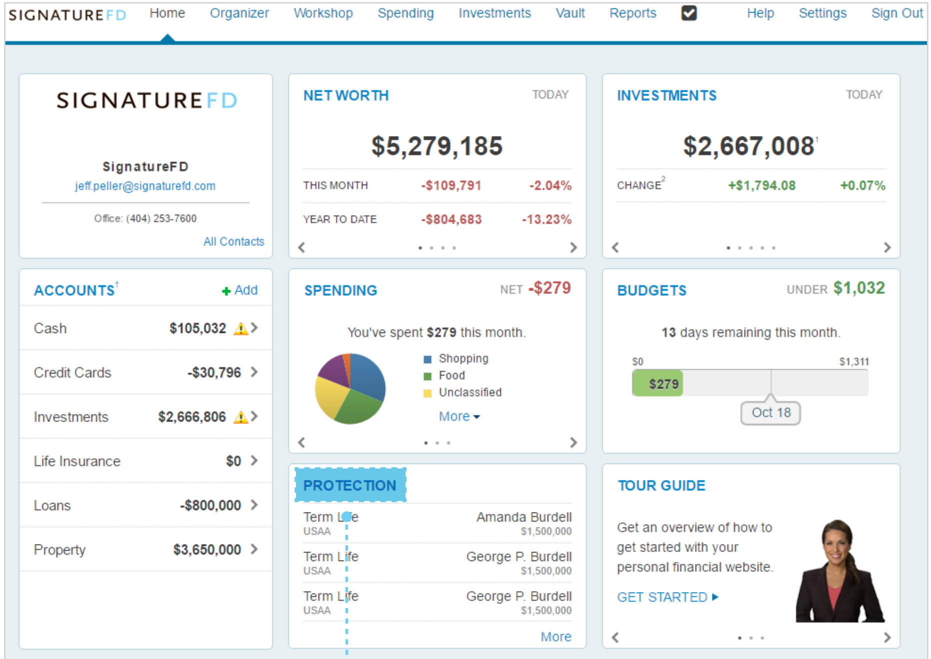
Prepared for George P. and Amanda Burdell

The Balance Sheet shows the value of your assets and liabilities, and your net worth.

Assets	George P.	Amanda	Joint - ROS	Total
Savings (-2358)	--	--	$105,032	$105,032
Betty Investment (-1001)	--	105,928	--	105,928
George Burdell	--	--	108,976	108,976
Joint Investment Account (-7073)	--	--	48,000	48,000
LP Investments	--	--	513,191	513,191
Sample Family Charitable Fund (-1153)	--	--	43,439	43,439
Schwab Investment (-6616)	--	--	715,219	715,219
Betty 401(k) (-40SB)	--	239,776	--	239,776
Betty IRA (-1004)	--	125,920	--	125,920
Bob 401(k) (-40TB)	273,781	--	--	273,781
Bob IRA Rollover (-6620)	164,917	--	--	164,917
Betty Roth (-1002)	--	10,131	--	10,131
Bob Roth (-6607)	5,671	--	--	5,671
LLC 1	750,000	--	--	750,000
LLC 2	500,000	--	--	500,000
Lot in Atlanta	--	--	100,000	100,000
Primary Residence	--	--	2,000,000	2,000,000
Personal Property	--	--	300,000	300,000
Total Assets:	**1,694,369**	**481,755**	**3,933,857**	**6,109,981**
Liabilities	**George P.**	**Amanda**	**Joint - ROS**	**Total**
Primary Residence Mortgage	--	--	($800,000)	($800,000)
************4761	--	--	(796)	(796)
Credit Card Debt	--	--	(30,000)	(30,000)
Total Liabilities:	**0**	**0**	**(830,796)**	**(830,796)**
Total Net Worth:	**$1,694,369**	**$481,755**	**$3,103,061**	**$5,279,185**

13. Protection

The **Protection** tab provides you with a summary of your insurance, which includes your life, disability, long-term-care, and property and casualty insurance. When you click on this box, you can see information about your policies.

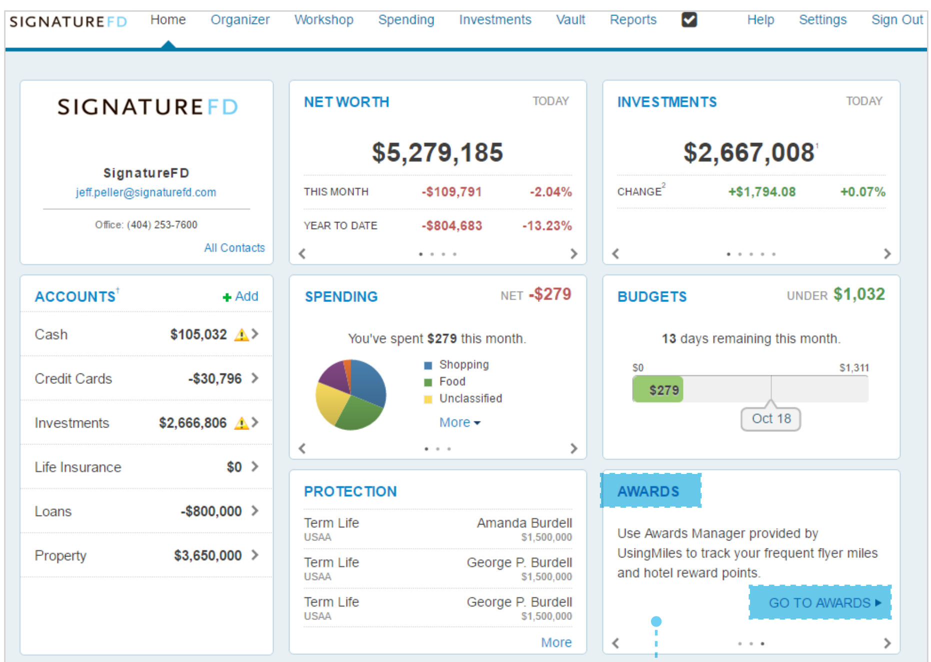


14. Awards

The **Awards** tab is a free service that allows you to track frequent flier miles, hotel award points, credit card awards and other points programs.

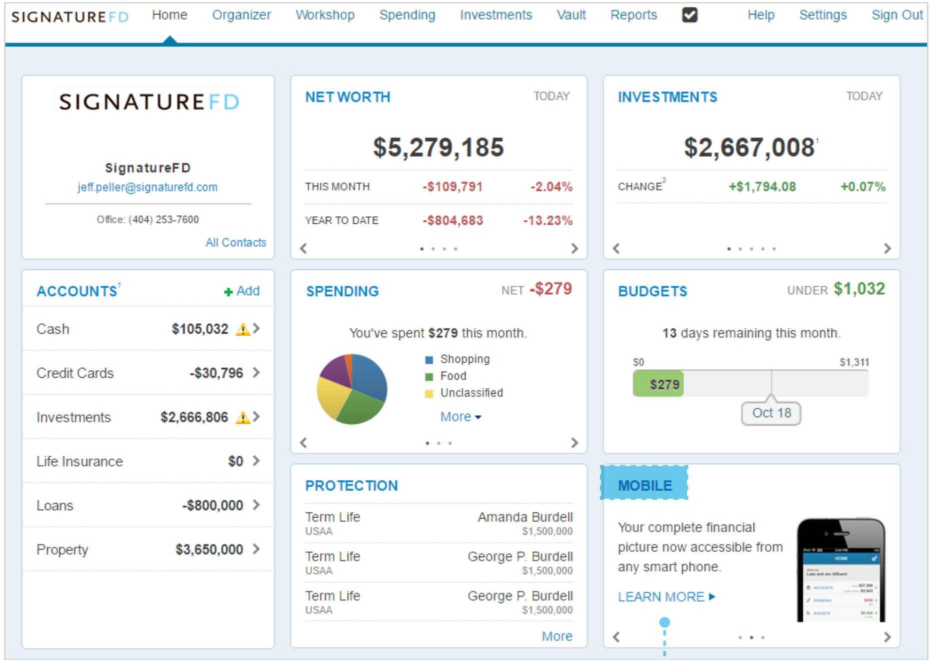
a. By signing up for access, you can track your awards on the web. You can also receive statements and alerts via email.

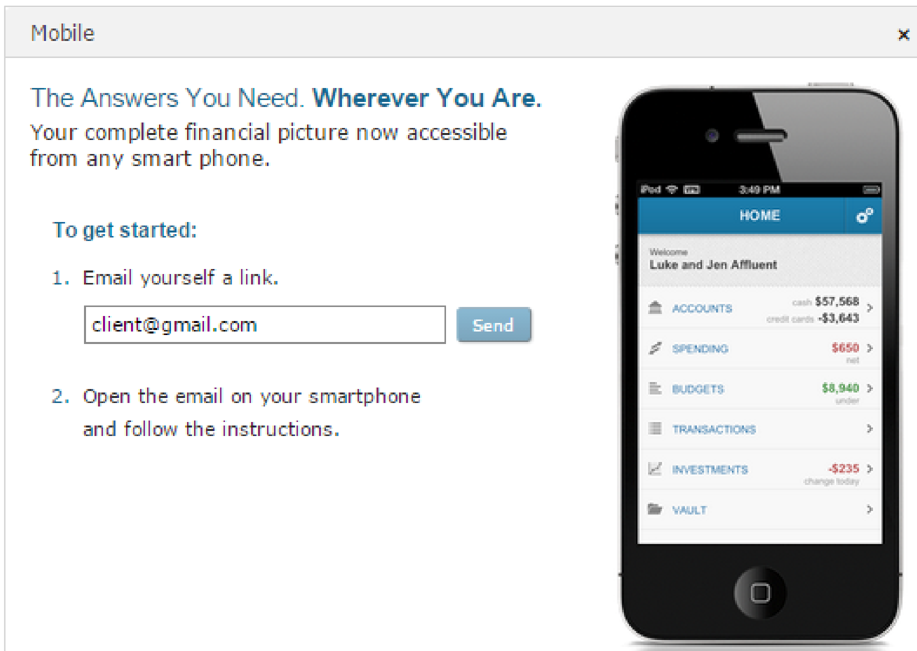
b. To enroll, go to the home page and scroll through the tiles at the bottom right side of the page until you see **Awards**. Click **Go to Awards**.



15. Mobile

The Financial Design Center is also available on your mobile devices.





Disclosures and Disclaimers

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