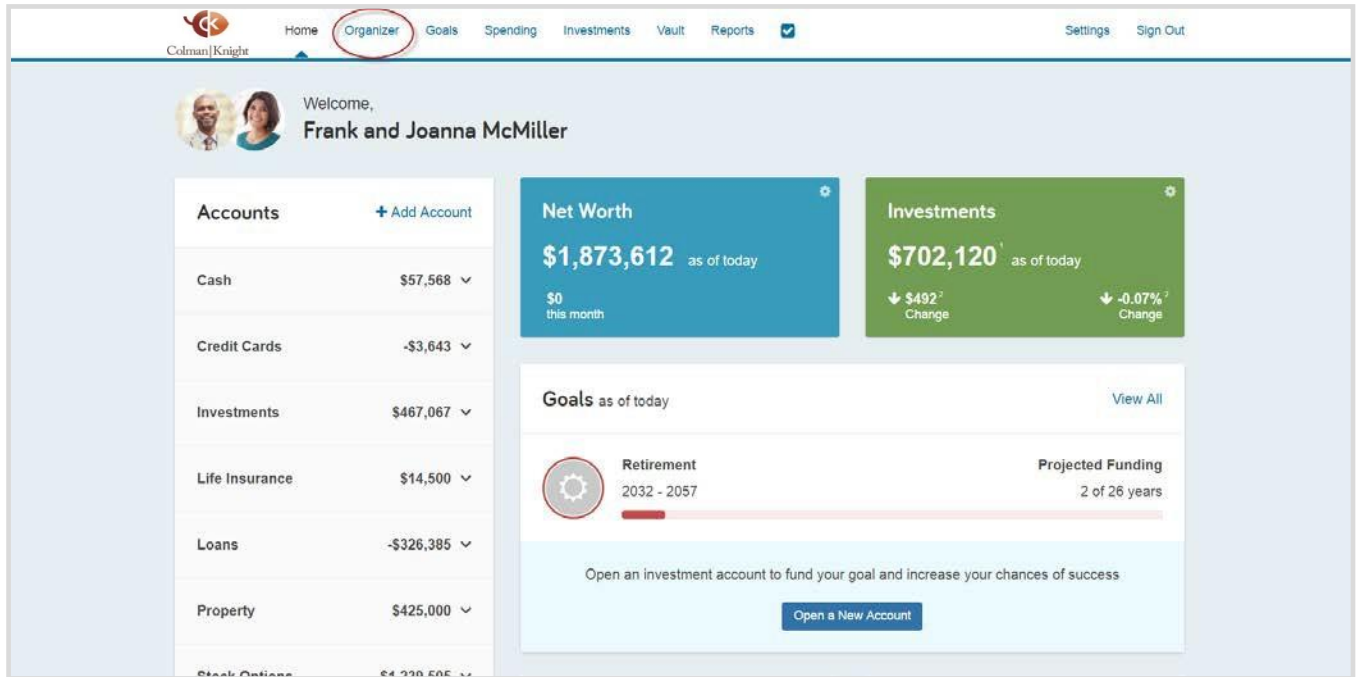


In this guide we will walk you through the features of your client site organizer. Use the Organizer to group all of your financial information in one place. Click the different sections to add and edit the related information. The information included here will be used to populate other areas of the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

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



The screenshot shows the Colman|Knight Organizer interface. At the top, the navigation bar includes Home, Organizer (highlighted with a red circle), Goals, Spending, Investments, Vault, Reports, Settings, and Sign Out. Below the navigation bar, a welcome message reads "Welcome, Frank and Joanna McMiller".

The main content area is divided into several sections:

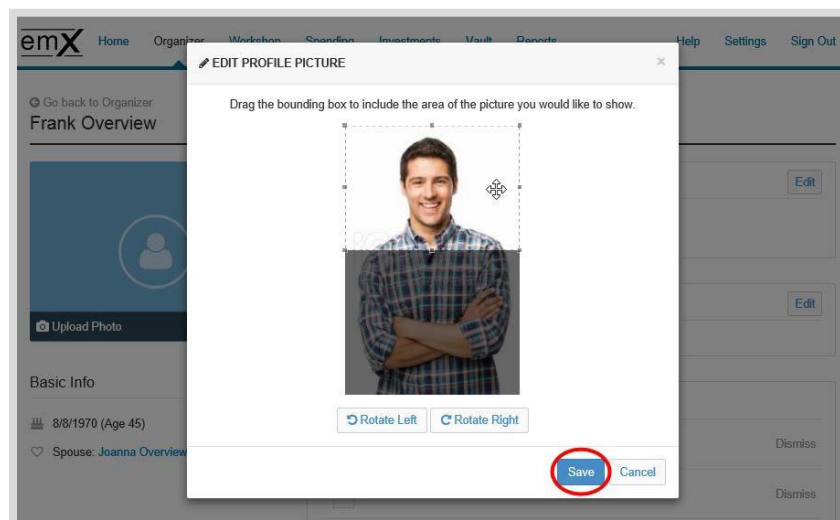
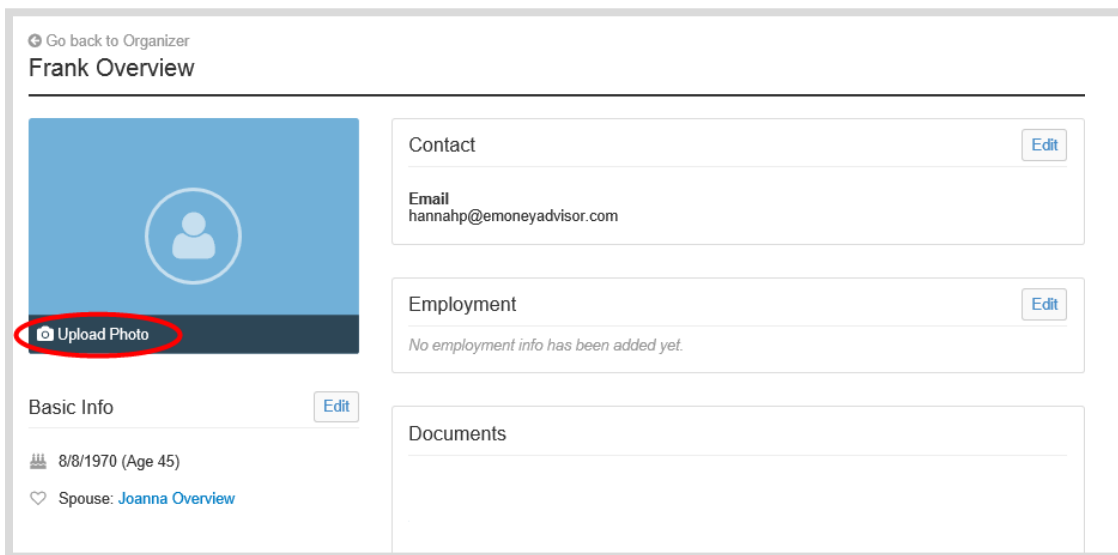
- Accounts:** A list of financial accounts with their current balances and a "+ Add Account" button. The accounts listed are:

Account Type	Balance
Cash	\$57,568
Credit Cards	-\$3,643
Investments	\$467,067
Life Insurance	\$14,500
Loans	-\$326,385
Property	\$425,000
Stock Options	\$4,228,505
- Net Worth:** A blue card showing a net worth of \$1,873,612 as of today, with a change of \$0 this month.
- Investments:** A green card showing investments of \$702,120 as of today, with a change of -\$492 and a percentage change of -0.07%.
- Goals:** A section titled "Goals as of today" with a "View All" link. It features a "Retirement" goal for the years 2032 - 2057, with a "Projected Funding" of 2 of 26 years. Below this, a message states "Open an investment account to fund your goal and increase your chances of success" with a button labeled "Open a New Account".

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

The screenshot displays a financial organizer interface. On the left is a navigation menu with items: Accounts, Professional Contacts, Income, Expenses, and Savings, Future Goals, Financial Priorities, and Risk Tolerance. The main area features two profile cards for Frank Miller (FM) and Joanna Miller (JM). Frank Miller's profile includes options to Add Phone, Add Email (hannahp@emoneyadvisor.com), Add Birthdate (6/1/1964), and Add Employment. Joanna Miller's profile includes options to Add Phone, Add Email, Add Birthdate (3/20/1965), and Add Employment. Below the profiles are two sections: 'People' and 'Property'. The 'People' section has an 'Add Person' button circled in red and five person icons labeled Peter (PM), Mary Beth (MM), Lucas (LM), Elaine (EG), and Stephanie (SM). The 'Property' section has an 'Add Property' button circled in red and four property icons labeled Cars (diamond), Home (house), Jewelry (diamond), and Vacation Mountain Home (house).


- 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.



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

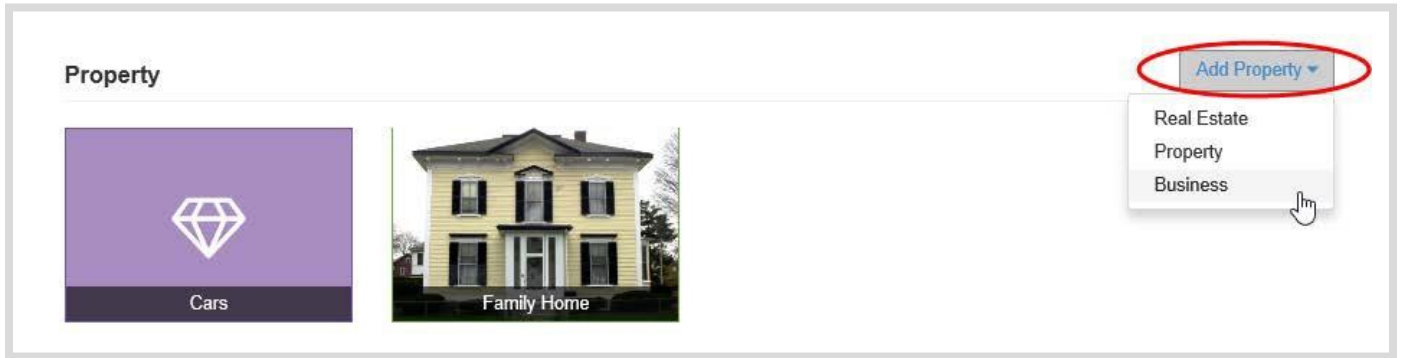
5. On the organizer main tab, you will also be able to add relevant **People** and **Property**.

The screenshot displays the Organizer Overview interface. On the left is a navigation menu with items: Accounts, Professional Contacts, Income, Expenses, and Savings, Future Goals, Financial Priorities, and Risk Tolerance. The main area is divided into two columns for 'Frank Overview' and 'Joanna Overview'. Frank's overview includes 'Add Phone', an email address 'hannahp@emoneyadvisor.com', a birth date of '8/8/1970', and 'Add Employment'. Joanna's overview includes 'Add Phone', 'Add Email', a birth date of '7/4/1973', and 'Add Employment'. Below these are two sections: 'People' and 'Property'. The 'People' section shows three profile cards for 'Mary', 'Lucas', and 'Elaine', and an 'Add Person' button circled in red. The 'Property' section shows two cards: 'Cars' (represented by a diamond icon) and 'Family Home' (represented by a house image), and an 'Add Property' button circled in red.

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.

This is a close-up of the 'Add Person' button from the 'People' section, which is circled in red. A dropdown menu is open, showing the following options: 'Child', 'Parent', 'Grandchild', 'Great Grandchild', and 'Other'. A mouse cursor is pointing at the 'Other' option.

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.



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.

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:

Institution Name:

Owner: [+ Add](#)

Total Value:

Holdings Value:

Cash Balance:

Margin Balance:

Tax Basis:

[View Holdings](#)

View

- [Investment Summary](#)
- [Asset Allocation](#)
- [Investment Transactions](#)

[X Delete this Account](#)

Documents

[+ Add Other](#)

View dismissed suggestions


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

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](#)


Colman|Knight
Colman Knight Advisory Group, LLC
18 Audubon Lane
Carlisle, MA 01741

Richard Colman
rich@colmanknight.com
Office: (978) 371-2015
[Contact Me](#)

Contact Name	Role	Email	Phone
 Ben Alliance	Alliance Partner	hannahp@emoneyadviswor.com	(888) 362-8482 
 Joe Murphy	CPA	joemurphy@nomail.com	(888) 362-8482 

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 ✕
Joanna's Salary	\$65,000 ✕

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 ✕
---------------	---

Major Expenses [Add](#)

Addition to House	\$80,000 ✕
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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.

