



# eMoney Client Sign-Up Instructions

**Step 1:** You will receive a text message stating that your advisor has given you online access to view your accounts. This text will also tell you to look for an email titled “HD Vest eMoney Access.”



**Step 2:** Find the email titled “HD Vest eMoney Access.” Open this email and click on the link provided to you.

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Dear N

Thank you for requesting online access to view your accounts. As your HD Vest Advisor, I am happy to provide you access to our eMoney portal, which allows you to easily review a summary of all of your accounts and share documents with me. To complete your registration for the eMoney portal, please go to <https://emoney.hdvest.com/register?code=b823b469-39de-4663-89de-cd740631cdac>.

If you have any questions, please do not hesitate to call my office.

Thanks,



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**Step 3:** The link will take you to a sign up page. Enter your Social Security Number and Date of Birth and click “Send Temporary Password” (If more than one person is in the household, it will require both parties Social Security Number and Date of Birth). This will then take you to a screen with your mobile phone number(s), select the correct number and click “Send Temporary Password”

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### Sign Up for eMoney Portal

Your HD Vest Advisor has invited you to sign up for eMoney web portal. Please provide the following information to proceed.

(Primary account holder)

\* Social Security Number      \* Date of Birth

(Secondary account holder)

Social Security Number      Date of Birth

I'm not a robot

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Success! We have validated your credentials.

Please confirm the phone number to send your temporary password.

On clicking 'Send Temporary password', we will send you a text message containing your temporary password. You can use this password to login to your eMoney website.

**Step 4:** You will then be given a username for your account. (Write this username down before you go to the login screen) Click “Launch eMoney” and use the username and the temporary password sent to you via text to log in to your eMoney portal. Create the security questions and write the answers in.

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Important:

Your eMoney User Id is

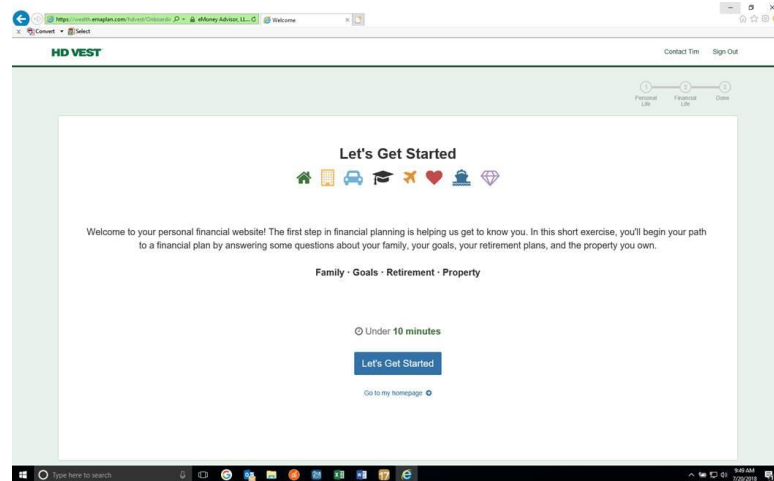
Make a note of this username, you will need it to log in to eMoney.

We have sent your temporary password to . Please click the button below to access your eMoney Portal.

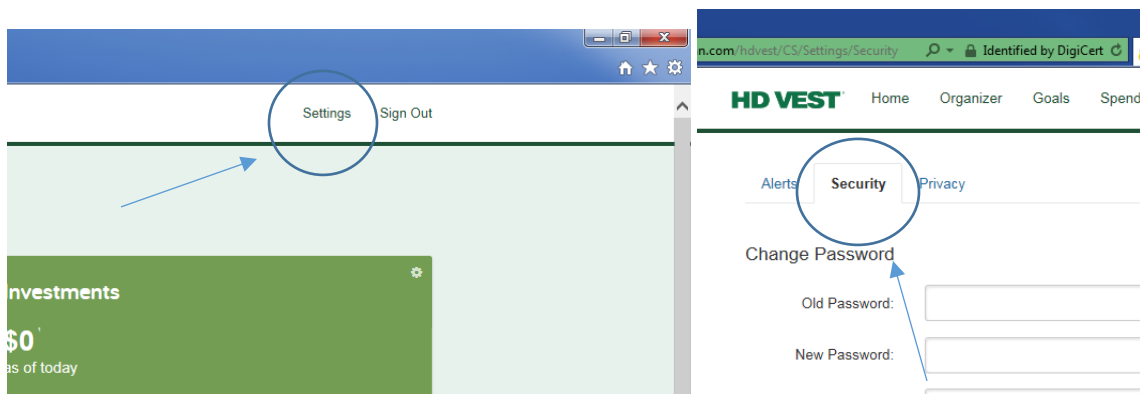
Didn't receive the temporary password? [Click here](#) to re-send your password.

To change your eMoney password, login to eMoney then go to Settings -> Security Tab.

**Step 5:** After logging in, you will be directed to a screen in which you can go through an onboarding process that has “Let’s Get Started” at the top that will let you set goals and plans for your financial future as well as enter information about your current financial situation. If you wish to do this click “Let’s Get Started” or if you want to do it another time click “take me to my homepage” at the bottom of the screen.

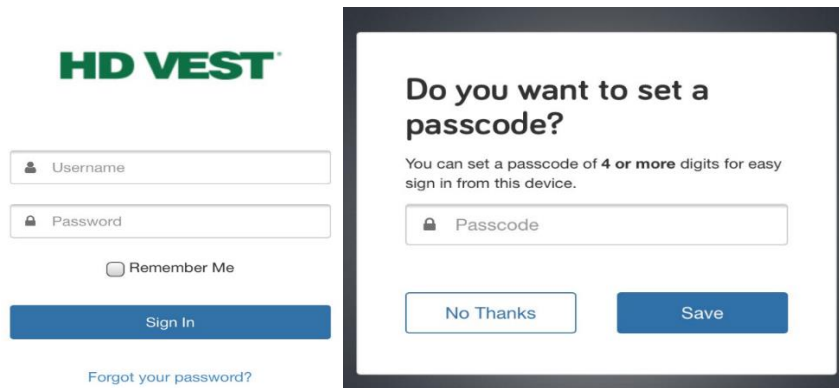


**Step 6 (Recommended):** To change the password from the temporary password into one you can remember, click on the “Settings” tab from your eMoney websites homepage, then click the “Security” tab. Type in the temporary password and your new password, then hit Save.

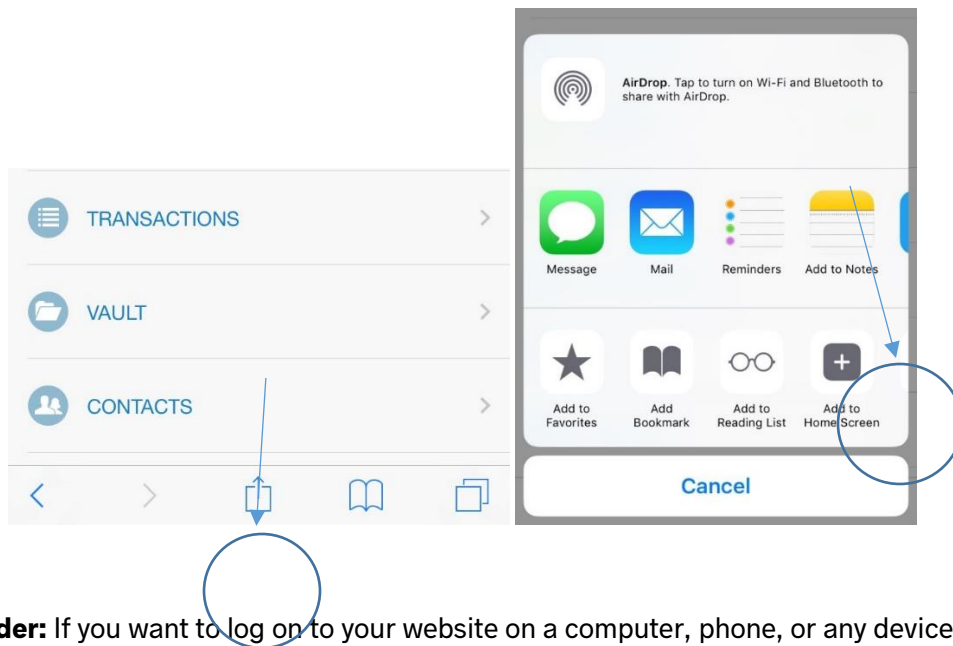


**Step 7 (Setting up on iPhone or Android):** On your iPhone or Android, go to Safari or your preferred web browser and type in <https://wealth.emaplan.com/hdvest>. Proceed to type in your username and password. It will then ask you to set a passcode for easier login. Type in the passcode you wish to use and proceed to your website.

Please note that the screenshots are from an iPhone. Android users will have a slightly different view, but the experience and instructions are the same.



Once in your website, add this site to your bookmark tool bar.



**Reminder:** If you want to log on to your website on a computer, phone, or any device that you aren't already logged into, the website that is used to access your log in is [www.wealth.emaplan.com/hdvest](http://www.wealth.emaplan.com/hdvest)

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