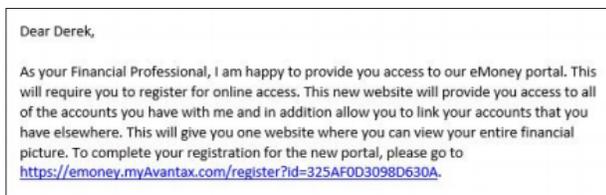


eMoney Client Sign-Up Instructions

1. You will receive a text message stating that your Financial Professional has given you online access to view your accounts. This text will also tell you to look for an email titled eMoney Access.

Your Financial Professional has given you online access to view your accounts. Look for an email titled "eMoney Access" for instructions.

2. Find the email titled eMoney Access. Open this email and click on the provided link.



3. The link will take you to a sign-up page. Enter your **Social Security Number or ID Number** that your Financial Professional can provide and your **Date of Birth**.
 - Click **Sign Up**. If more than one person is in the household, both parties Social Security Numbers or ID Numbers and Dates of Birth are required.

- You will then see a screen with your mobile phone number(s), select the correct number and click **Send Password**.

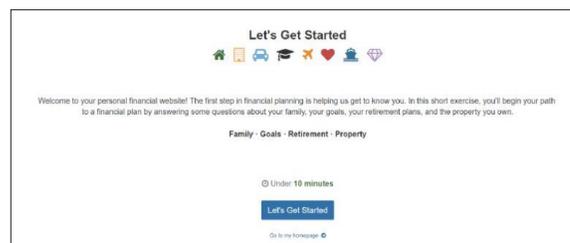
4. You will then be given a username for your account. Write this username down before you go to the Login screen. Select **Click to Launch eMoney** and use the username and the temporary password sent to you via text to log in to your eMoney portal. You will be asked to create security questions.

Important:
Your eMoney User Id is **JonesDer1**
Make a note of this username, you will need it to log in to eMoney.

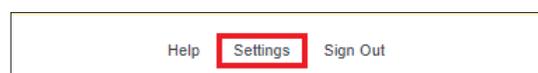
We have sent your password to (214) 402- Please change it as soon as possible after you login to the eMoney website by clicking the button below.

Resend Password ▾ **→ Click to launch eMoney**

5. After logging in, click **Let's Get Started** to set goals and plans for your financial future and to enter information about your current financial situation. To skip this step click **Go to my homepage** at the bottom of the screen.



6. It's recommended to change the password to one you can remember. Click the **Settings** tab from your eMoney homepage, then click the **Security** tab. Enter in the temporary password and your new password, then click **Save**. All passwords require at least 8 digits, one capital letter, one lower case letter, and a number.



SETTING UP EDELIVERY

Once you have completed your eMoney client portal set up, you can set your eDelivery preferences for your Avantax brokerage accounts.

1. Select **Settings** in the upper right then select the **eDelivery** tab and follow the steps to enable eDelivery. You must complete setup for each account.

Account	Enrollment Status
Individual (I) - HVT-016802	Not Enrolled
Individual (I) - HVT-017256	Not Enrolled
Individual (I) - HVT-034099	Not Enrolled

2. Once eDelivery is enabled, locate your documents in the Brokerage Account Documents folder contained within the Vault.

Usage: 17.74 MB (0 B are private)

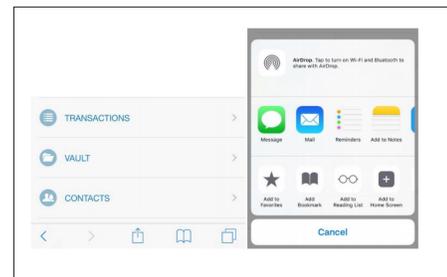
SETTING UP ACCESS ON IPHONE OR ANDROID

1. On your iPhone or Android, access Safari or your preferred web browser and enter <https://wealth.emaplan.com/hdvest>. Enter your username and password.



2. Next set a passcode for easier login.

3. Proceed to the eMoney site and add the site to your bookmark tool bar or home screen.



Note: The screenshots are from an iPhone. Android users will have a slightly different view, but the experience and instructions are the same.

EMONEY WEBSITE

You can access the eMoney website:

- Directly - <https://wealth.emaplan.com/hdvest>
- From the Avantax Wealth Management website, select **eMoney Portal** <https://www.avantaxwealthmanagement.com/login/>

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