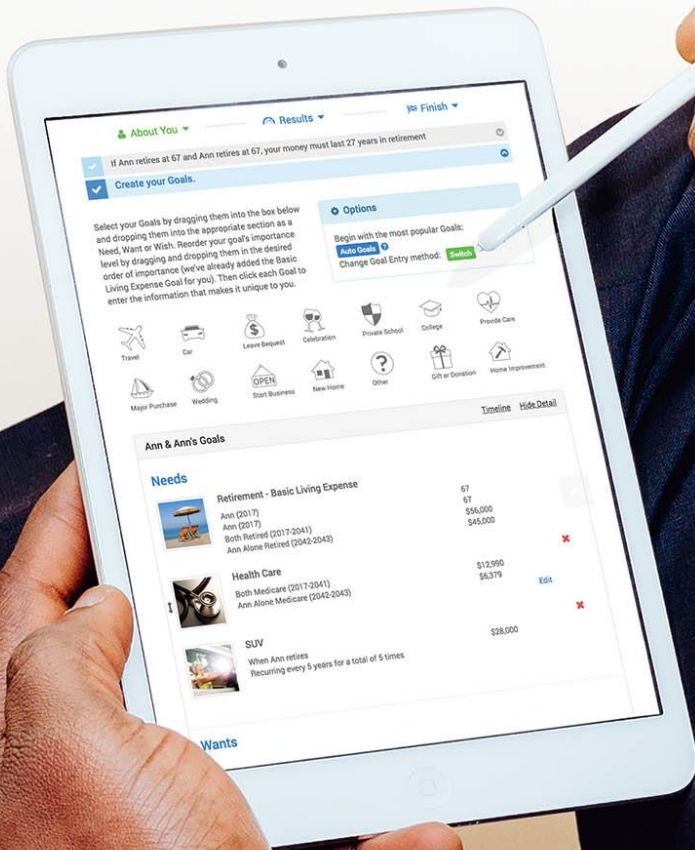




# ENVESTNET<sup>®</sup> MoneyGuide



Envestnet ENV2

# Envestnet ENV 2

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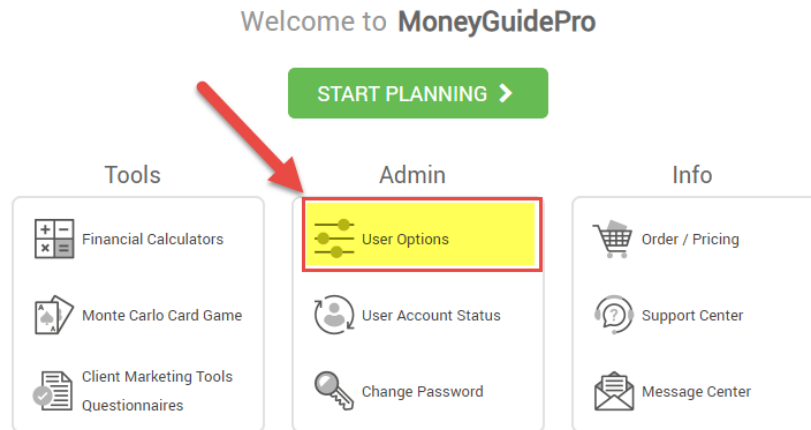
Setting up link between ENV 2 and MoneyGuide and Linking accounts from ENV 2 SSO (Launch) .....	2
Linking accounts from ENV 2 (Pull).....	7

## Linking Investnet ENV 2 with MoneyGuide and linking client accounts.

Before continuing, contact your Investnet ENV 2 Consultant and request the integration with MoneyGuide be enabled for your license.

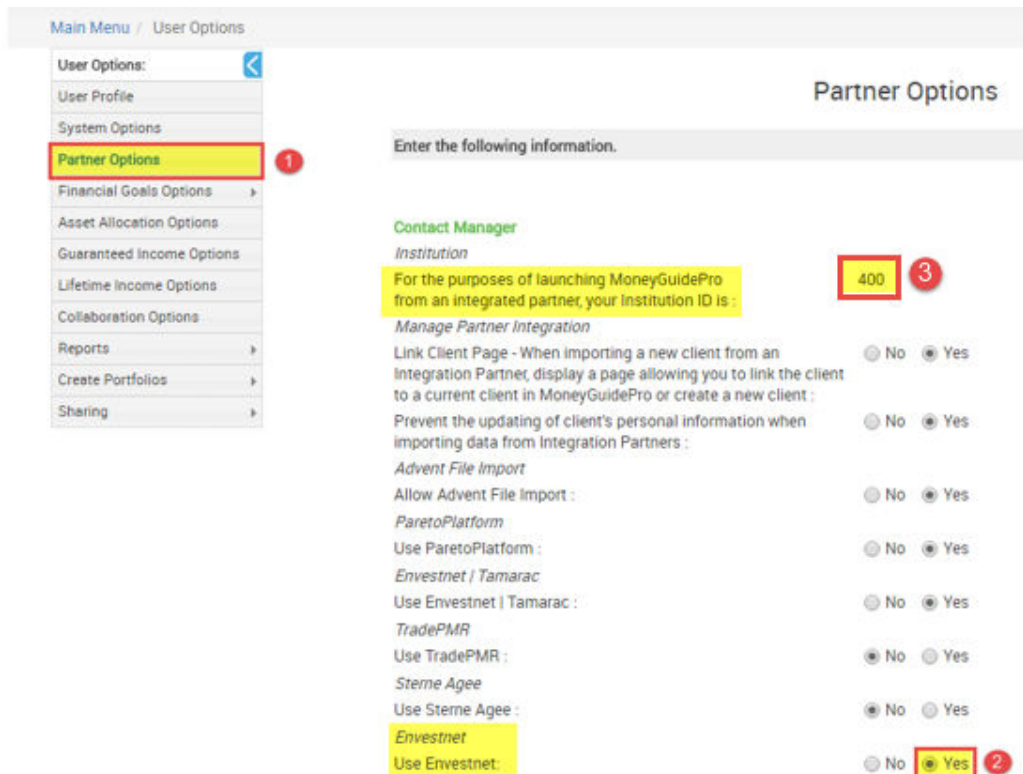
### Step 1:

Login to MoneyGuide and from the Main Menu, select User Options.



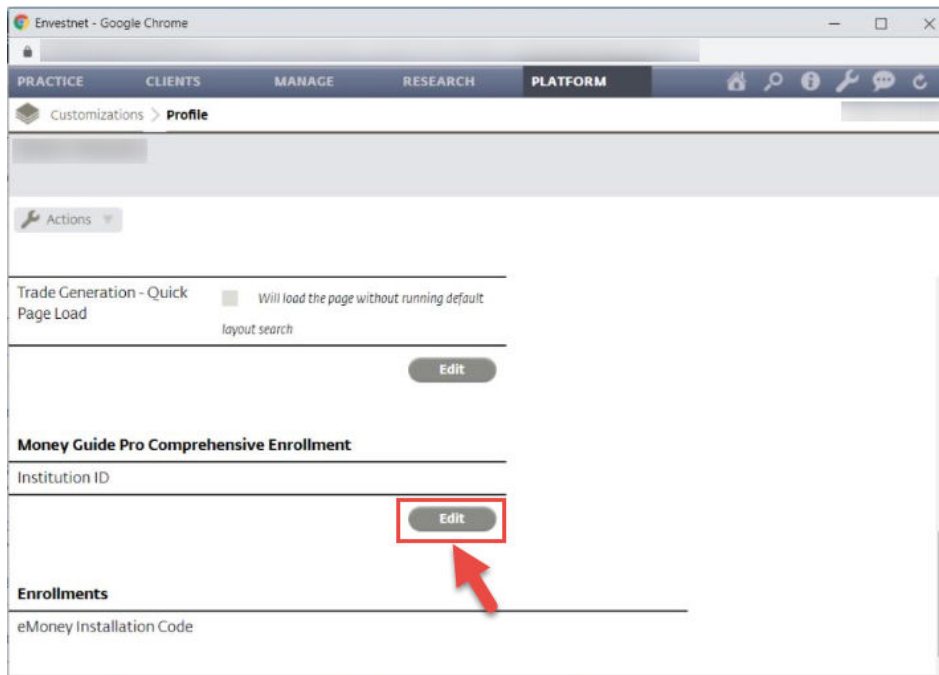
### Step 2:

Select Partner Options (1) on the left menu and scroll down to the section for Investnet. Verify the radio button is set to Yes (2). Note your MoneyGuide Institution ID, you will need this in step 4 (3).



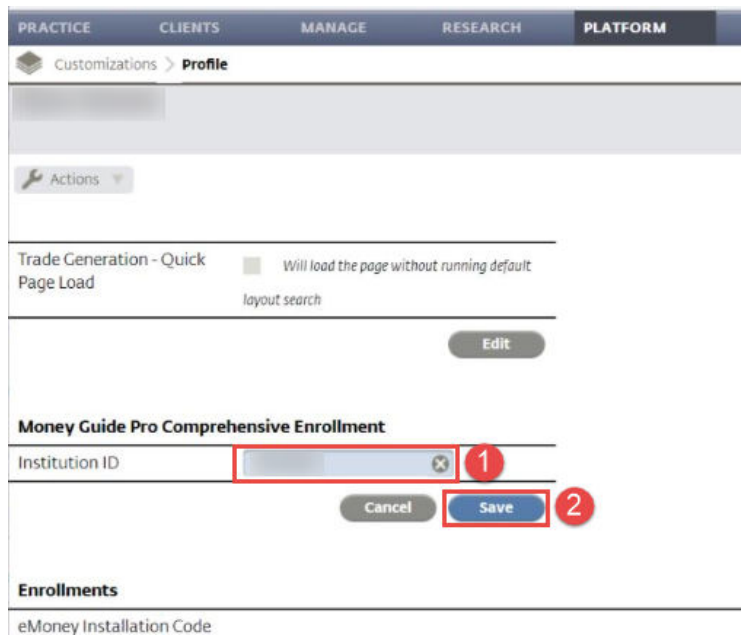
**Step 3:**

Login to ENV 2, select Platform > select Customizations > select Profile > MoneyGuide Comprehensive Enrollment > select Edit for Institution ID.



**Step 4:**

Enter your MoneyGuide Institution ID from Step 2 (1) and select Save (2).





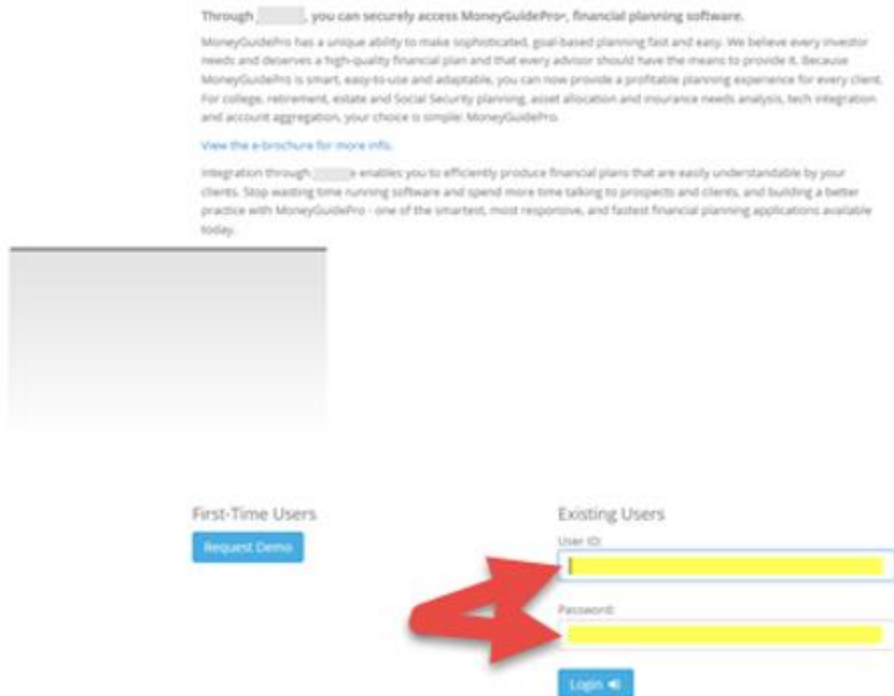
**Step 5:**

Navigate to the Client screen, select Clients > select General > select Financial Planning > select MoneyGuide.



**Step 6:**

If this is your first time linking with MoneyGuide, enter your MoneyGuide credentials in the User ID and Password fields. Then click Login. (You will not see this screen on subsequent logins.)



Step 7:

Option 1:

If you are creating the client in MoneyGuide for the first time, click the Add New Client button. Then go to Step 9.

Link to Client in MoneyGuidePro

You have submitted a new client (Test Client) from [redacted] that is not currently linked to a client in MoneyGuidePro.

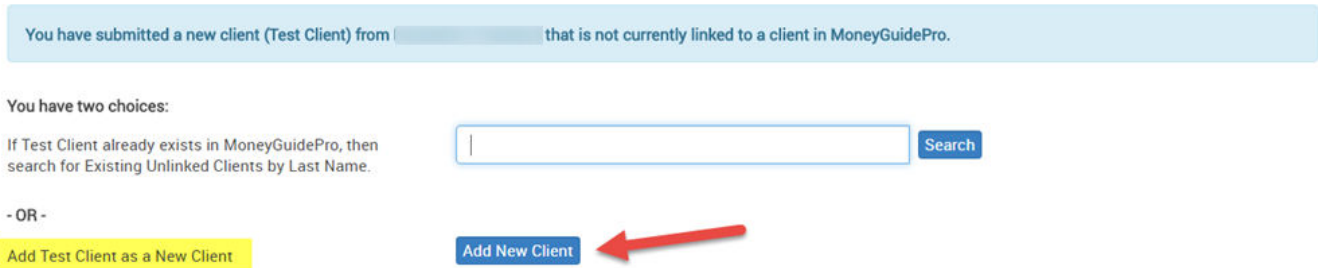
You have two choices:

If Test Client already exists in MoneyGuidePro, then search for Existing Unlinked Clients by Last Name.

- OR -

Add Test Client as a New Client

Add New Client



Option 2:

If you want to link your client to one that currently exists in MoneyGuide, type your client's last name into the empty box (1) and then click Search (2).

Link to Client in MoneyGuidePro

You have submitted a new client (Test Client) from [redacted] that is not currently linked to a client in MoneyGuidePro.

You have two choices:

If Test Client already exists in MoneyGuidePro, then search for Existing Unlinked Clients by Last Name.

- OR -

Add Test Client as a New Client

Add New Client

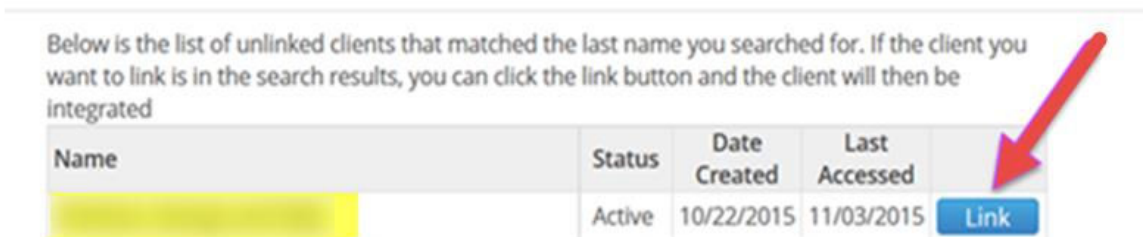


Step 8:

Then click Link beside the client you wish to link in MoneyGuide.

Below is the list of unlinked clients that matched the last name you searched for. If the client you want to link is in the search results, you can click the link button and the client will then be integrated

Name	Status	Date Created	Last Accessed	
[redacted]	Active	10/22/2015	11/03/2015	Link



**Step 9:**

Map the account(s) by selecting which accounts to import, the correct account owner, and account type (1). After completing this process, select the Continue button (2).

**Please Map the following Accounts**

Please confirm the Account Types and Owners for the information listed below.

**Investment Assets**

Name / Description	Amount	Import?	Account Type	Owner	Joint Owner
	\$227,814	Yes	401(k)		
	\$37,015	Yes	Account	Joint	Survivorship
	\$612,643	Yes	Profit Sharing		
	\$286,602	Yes	401(k)		
	\$543,779	Yes	Account	Joint	Survivorship
	\$846,405	Yes	Account	Joint	Survivorship
	\$151,896	Yes	Variable Annuity		

1 → (Red arrows pointing to the first row)
   
2 → Continue

**Step 10:**

Once your accounts have been mapped, you will be taken to the My Plans page for your client. You can see the imported accounts under the Resources tab in the Profile or in a client's plan.

Main Menu / Clients / My Plans

## My Plans

Name / Description	Date Created	Last Accessed	Conversation	Copy	Delete
<b>Financial Goal Plan</b>					
Financial Goal Plan w/ shortage <i>Star Track - What If Scenario 1</i>	03/12/2014	5 hours ago	Retirement & Estate		
Financial Goal Plan (26)	07/28/2016	07/28/2016	Retirement		
Financial Goal Plan R1 w/o college	02/28/2014	05/19/2016	Retirement & Estate		
Click to see all 5 Plans >					
<b>Asset Allocation Plan</b>					
Asset Allocation Plan	02/28/2014	3 hours ago	--		
<b>Lifetime Income Plan</b>					
Lifetime Income Plan	02/28/2014	3 hours ago	--		

**Add New Plan**

- Financial Goal Plan
- Asset Allocation Plan
- Lifetime Income Plan

**Manage Client Portal**  
(access allowed)

---

**Other Features**

My Snapshot

Calculators

Profile

Budget

Manage Integrations

## Importing client accounts from Investnet ENV 2 into MoneyGuide, Pull Method:

**Important Note:** You must launch at least one client to establish the link between Investnet ENV 2 and MoneyGuide before using this method (see previous section.)

### Step 1:

Go to the client's My Plans page in MoneyGuide and select Manage Integrations.

Main Menu / Clients / My Plans

## My Plans

Name / Description	Date Created	Last Accessed	Conversation	Copy	Delete
<b>Financial Goal Plan</b>					
Financial Goal Plan w/ shortage <i>Star Track - What If Scenario 1</i>	03/12/2014	5 hours ago	Retirement & Estate		
Financial Goal Plan (26)	07/28/2016	07/28/2016	Retirement		
Financial Goal Plan R1 w/o college	02/28/2014	05/19/2016	Retirement & Estate		
<a href="#">Click to see all 6 Plans &gt;</a>					
<b>Asset Allocation Plan</b>					
Asset Allocation Plan	02/28/2014	3 hours ago	—		
<b>Lifetime Income Plan</b>					
Lifetime Income Plan	02/28/2014	3 hours ago	—		

### Add New Plan

- Financial Goal Plan
- Asset Allocation Plan
- Lifetime Income Plan

Manage Client Portal   
(access allowed)

### Other Features

My Snapshot

Calculators

Profile

Budget

Manage Integrations


FinaMetrica Risk Tolerance


AllDataAdvisor Aggregation


### Step 2:


Select Investnet from the list of available integrations.


## Manage Your Integrations

  
 Panoramix

  
 Asset Book

  
 PortfolioCenter®

  
 Morningstar Office™ File Based Integration

  
 Investnet



**Step 3:**

Enter in the client's last name (1) and click Search (2). This will allow you to select the client and associated accounts you want to import into MoneyGuide. After selecting the client and accounts, select Done (3).

**Manage Account Integration with Envestnet**

Search Envestnet for the accounts you would like linked/imported for  Select the search criteria below. Then click the search button.

Search By Client Name  **Search** **Done**

**Step 4:**

Map the account(s) by selecting which accounts to import, the correct account owner, and account type (1). After completing this process, select the Continue button (2).

**Please Map the following Accounts**

Please confirm the Account Types and Owners for the information listed below.

**Investment Assets**

Name / Description	Amount	Import?	Account Type	Owner	Joint Owner
	\$227,814	Yes	401(k)		
	\$37,015	Yes	Account	Joint	Survivorship
	\$612,643	Yes	Profit Sharing		
	\$286,602	Yes	401(k)		
	\$543,779	Yes	Account	Joint	Survivorship
	\$846,405	Yes	Account	Joint	Survivorship
	\$151,896	Yes	Variable Annuity		



**Step 5:**

Once your accounts have been mapped, you will be returned to the My Plans page for your client. You can see the imported accounts under the Resources tab in the Profile or in a client's plan.

Main Menu / Clients / My Plans

### My Plans

Name / Description	Date Created	Last Accessed	Conversation	Copy	Delete
<b>Financial Goal Plan</b>					
Financial Goal Plan w/ shortage <i>Star Track - What If Scenario 1</i>	03/12/2014	5 hours ago	Retirement & Estate		
Financial Goal Plan (26)	07/28/2016	07/28/2016	Retirement		
Financial Goal Plan R1 w/o college	02/28/2014	05/19/2016	Retirement & Estate		
Click to see all 5 Plans >					
<b>Asset Allocation Plan</b>					
Asset Allocation Plan	02/28/2014	3 hours ago	--		
<b>Lifetime Income Plan</b>					
Lifetime Income Plan	02/28/2014	3 hours ago	--		

**Add New Plan**

- Financial Goal Plan
- Asset Allocation Plan
- Lifetime Income Plan

[Manage Client Portal \(access allowed\)](#)

**Other Features**

My Snapshot

Calculators

Profile

Budget

Manage Integrations

Risk Tolerance

Aggregation

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