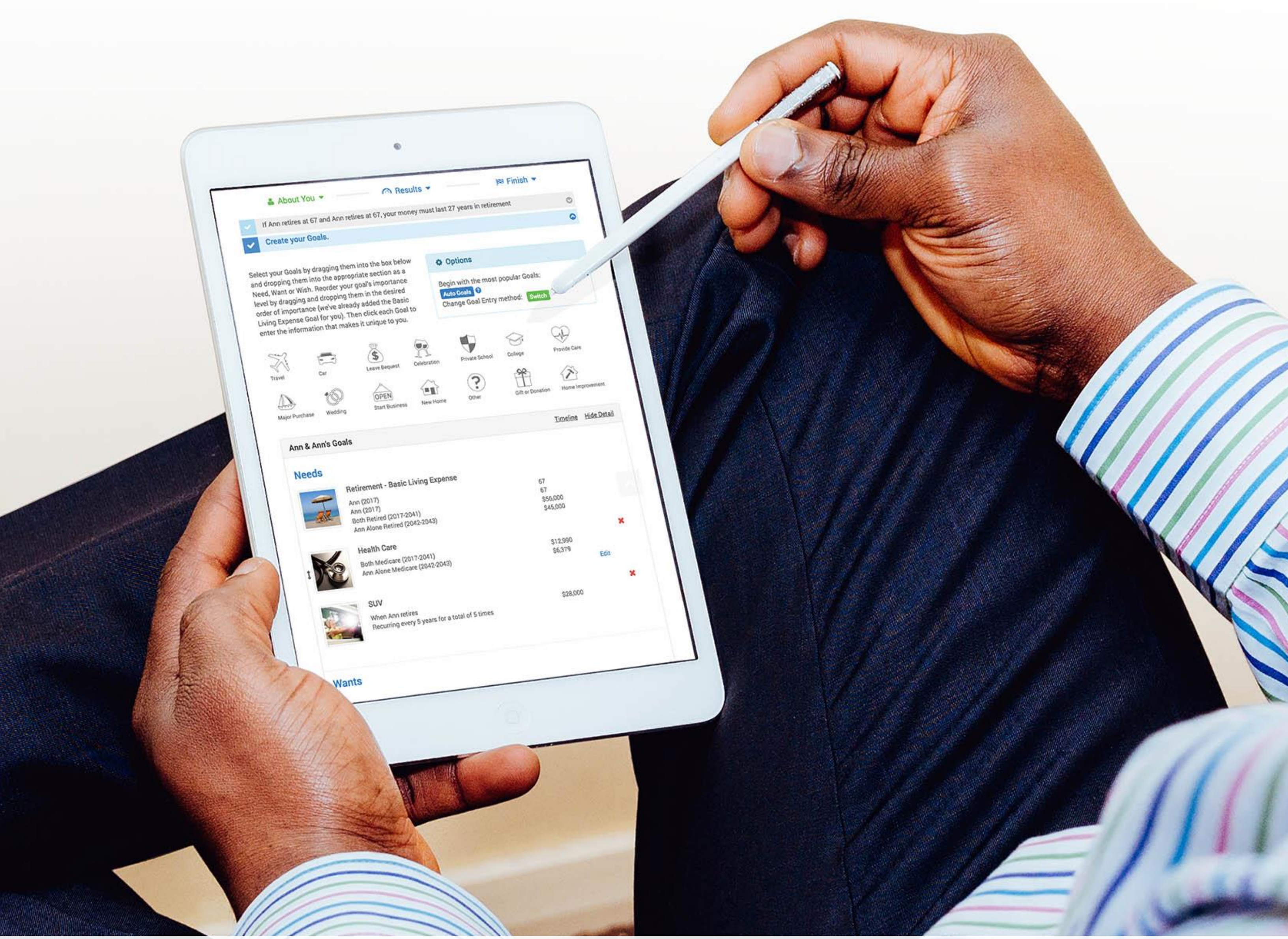
ENVESTNET® MoneyGuide



Envestnet ENV2

Envestnet ENV 2

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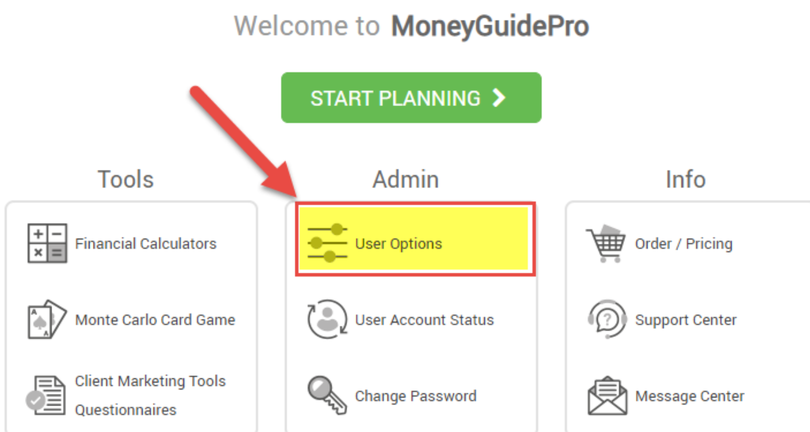
Linking Envestnet ENV 2 with MoneyGuide and linking client accounts.

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

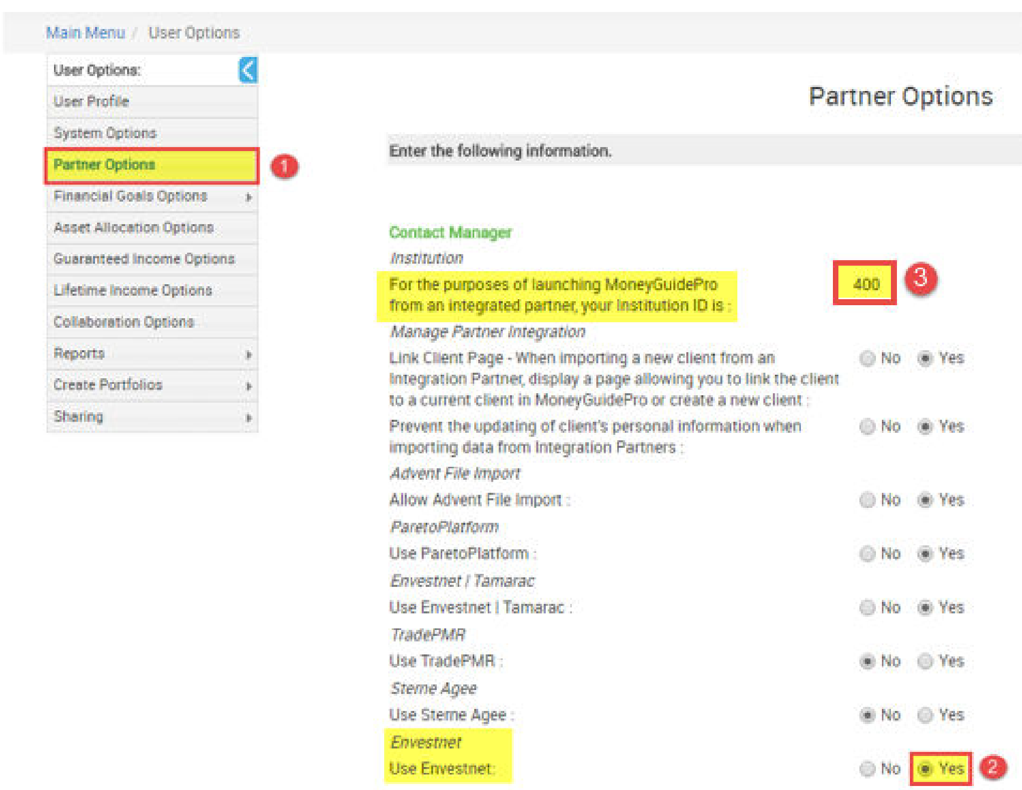
Step 1:

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



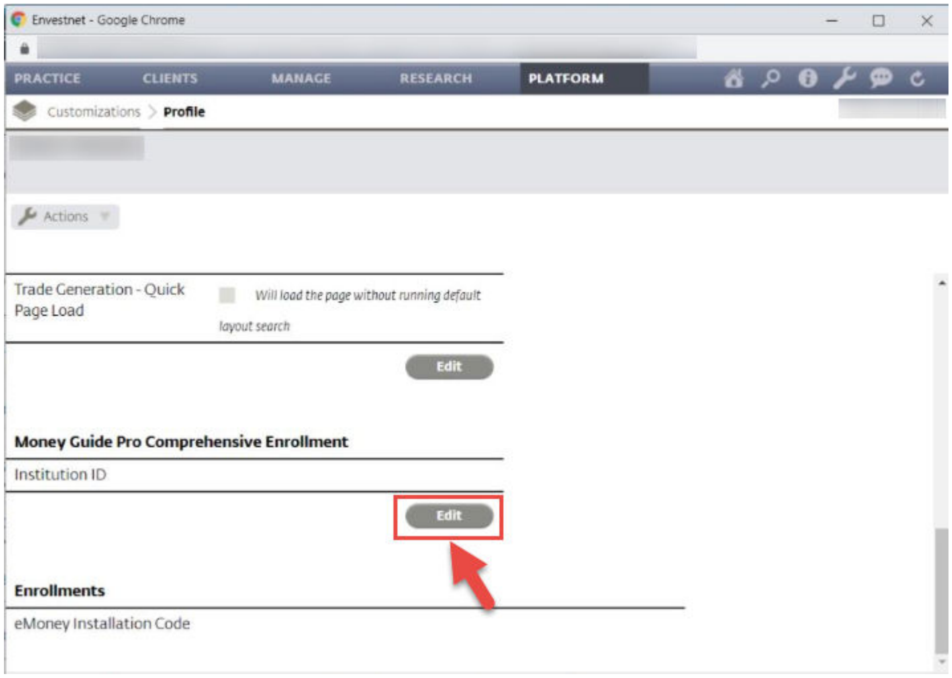
Step 2:

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



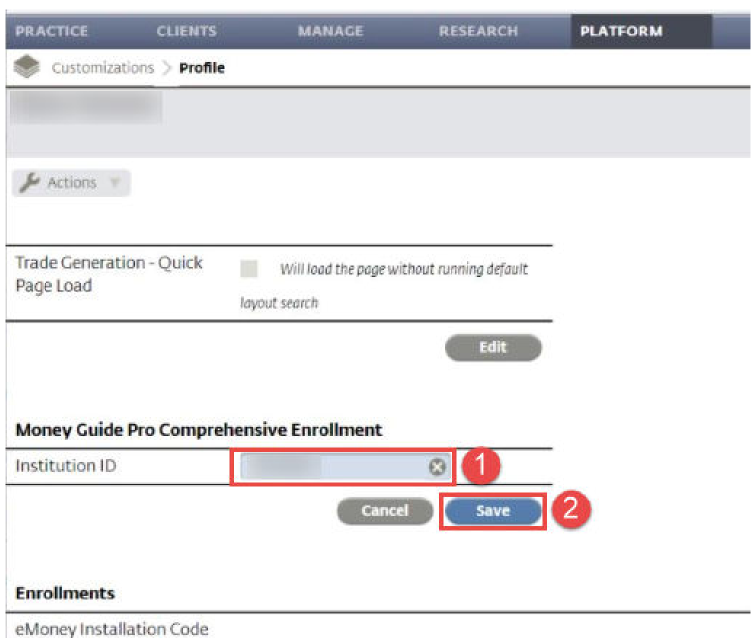
Step 3:

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).



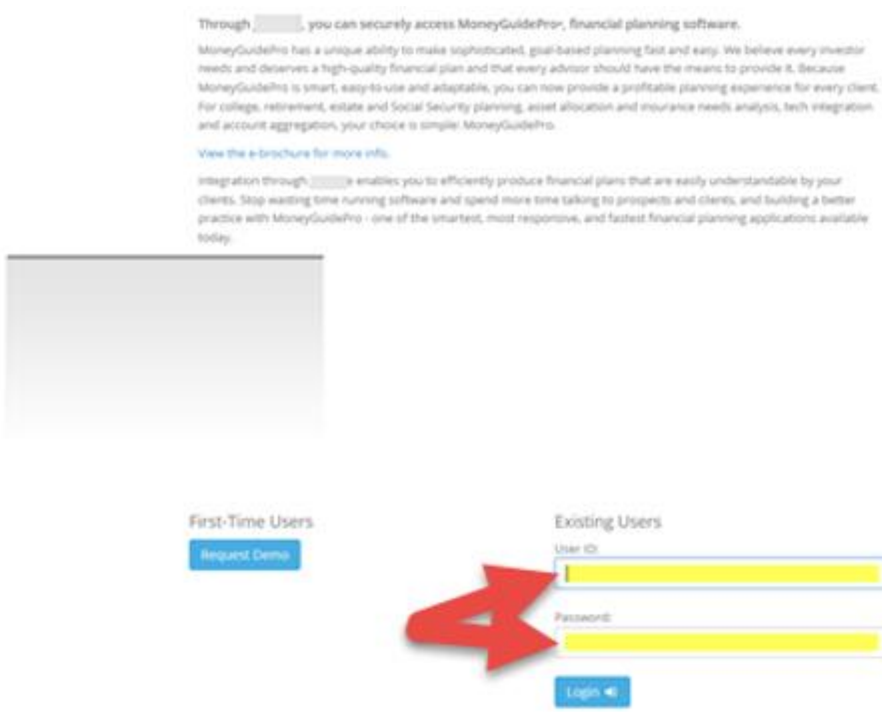
ENVESTNET MoneyGuide

Step 5:

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

Step 6:

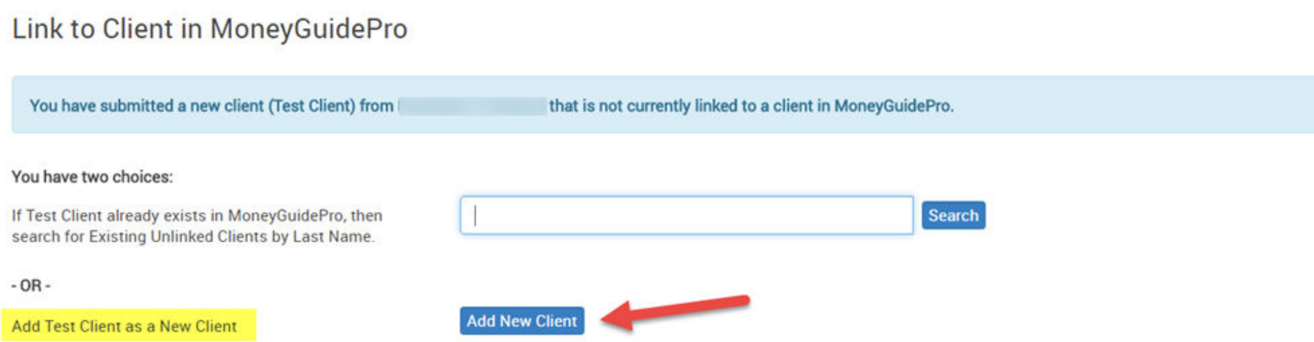
If this is your first time linking with MoneyGuide, enter your MoneyGuide credentials in the User ID and Password fields. Then click Login. (You will not see this screen on subsequent logins.)



Step 7:

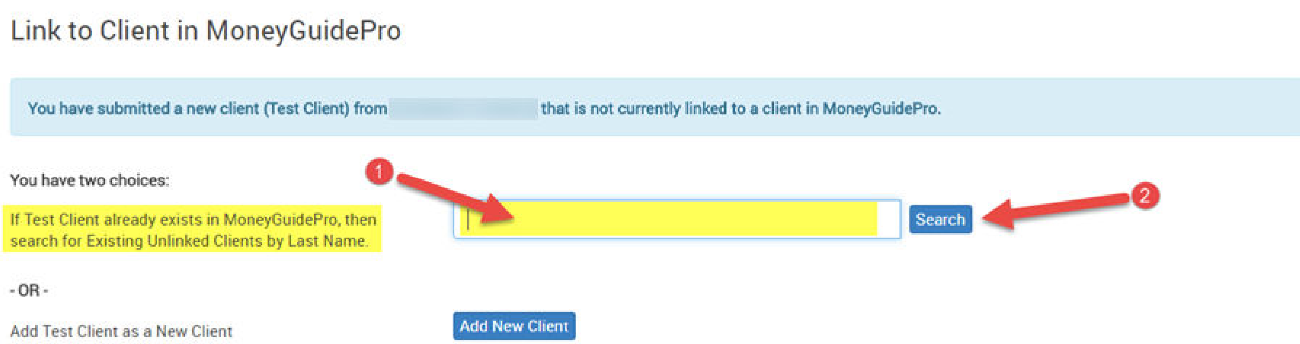
Option 1:

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



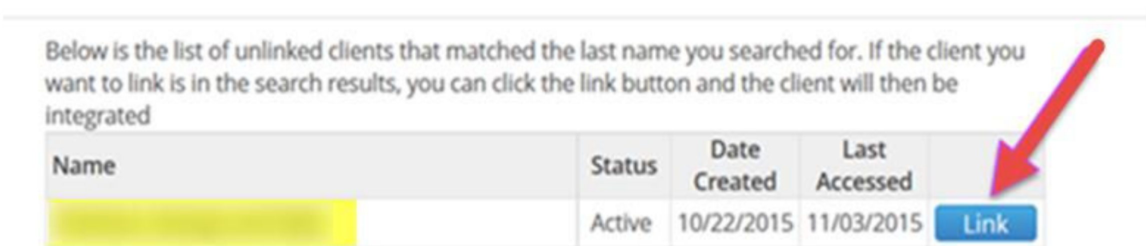
Option 2:

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).



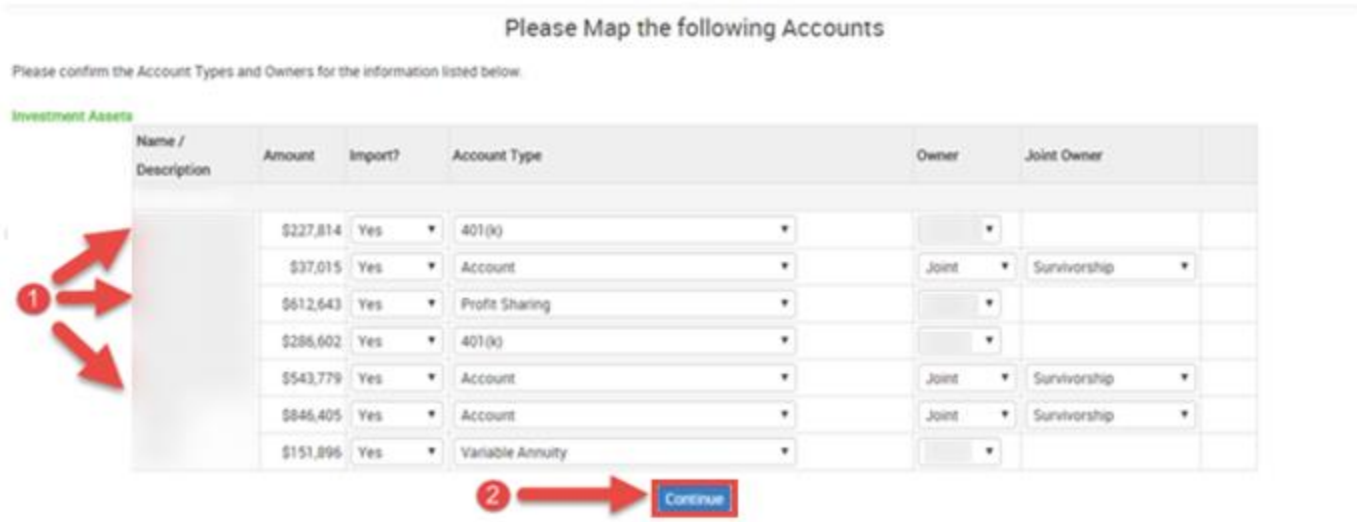
Step 8:

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



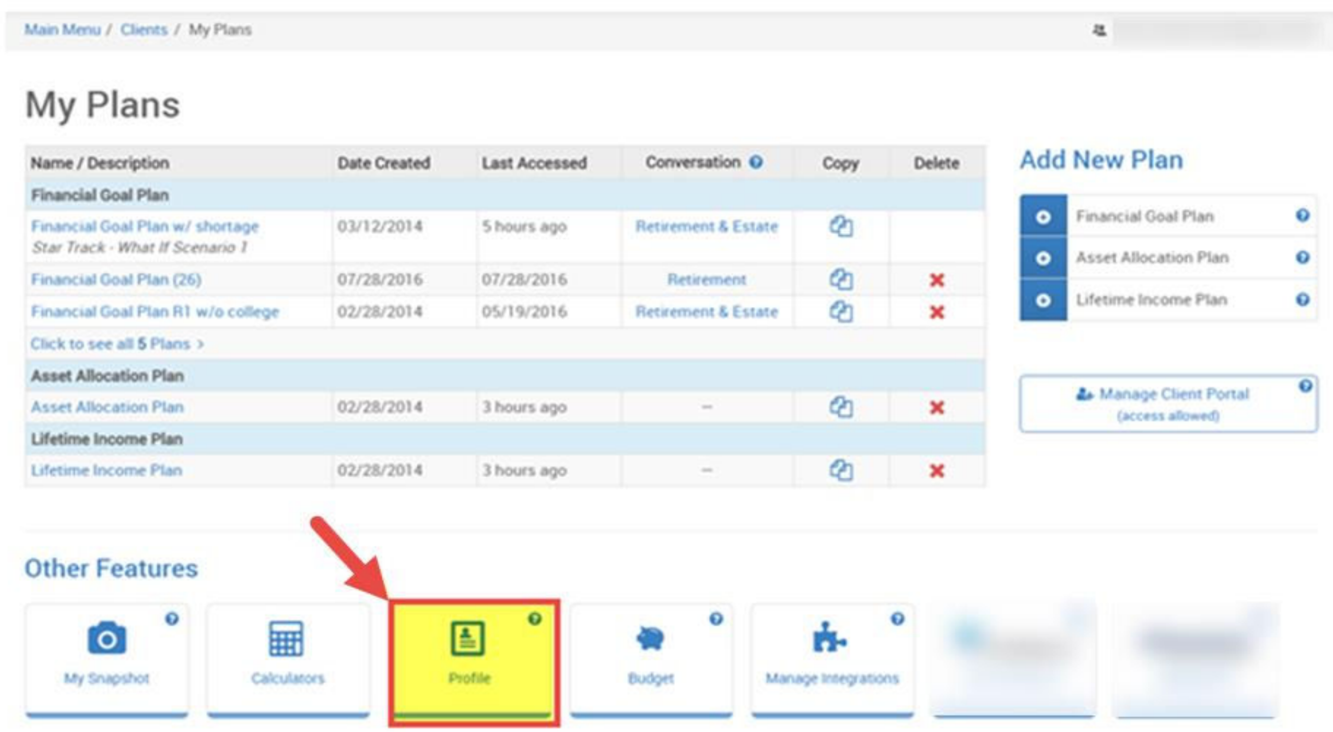
Step 9:

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).



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.

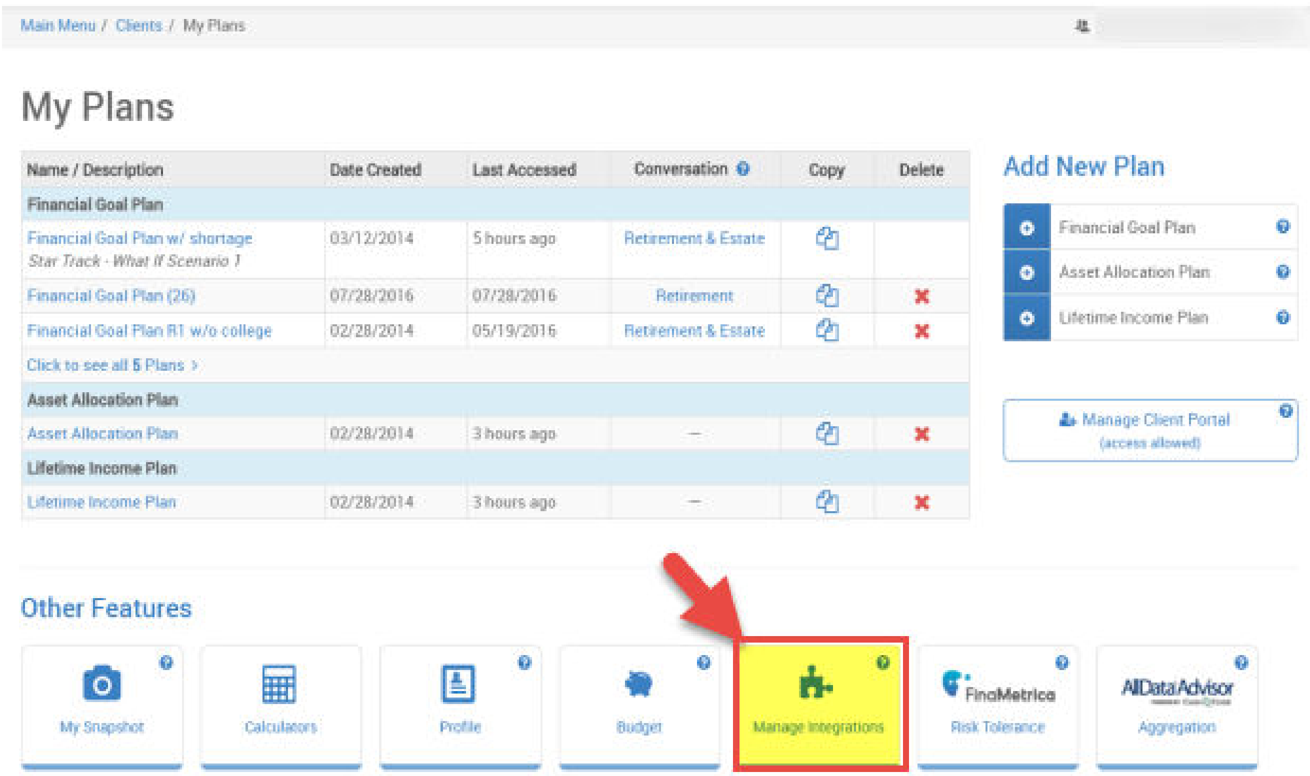


Importing client accounts from Envestnet ENV 2 into MoneyGuide, Pull Method:

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

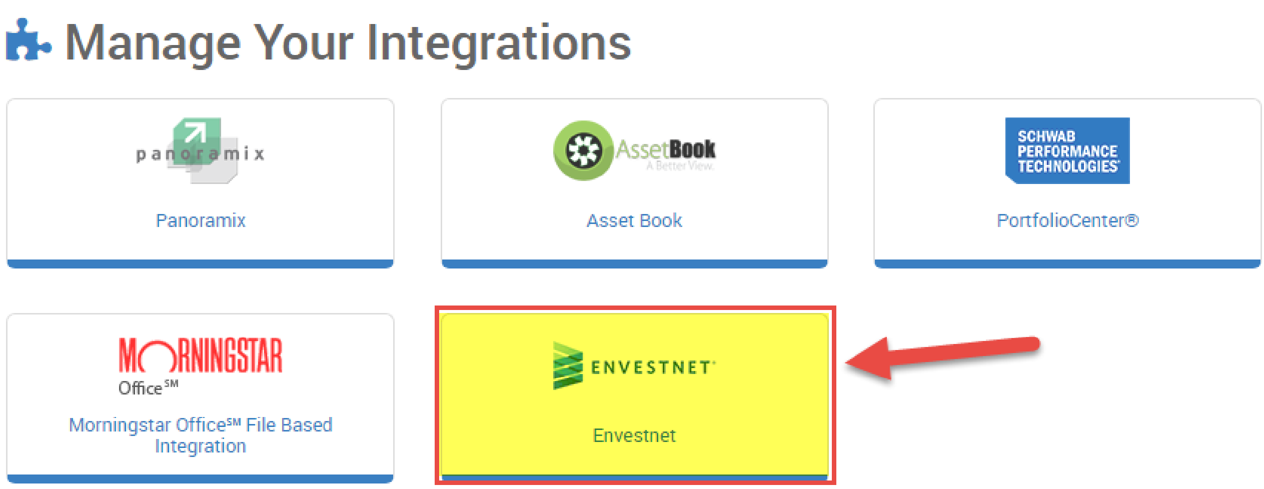
Step 1:

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



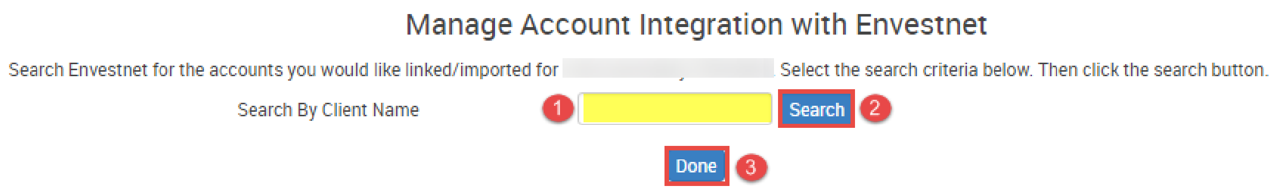
Step 2:

Select Envestnet from the list of available integrations.



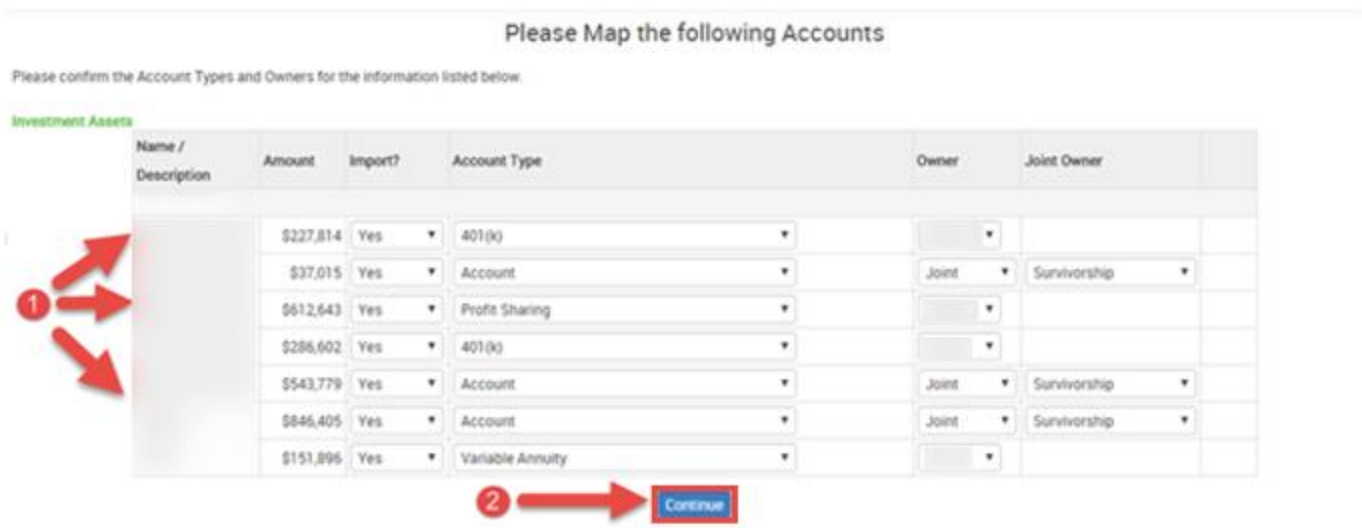
Step 3:

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).



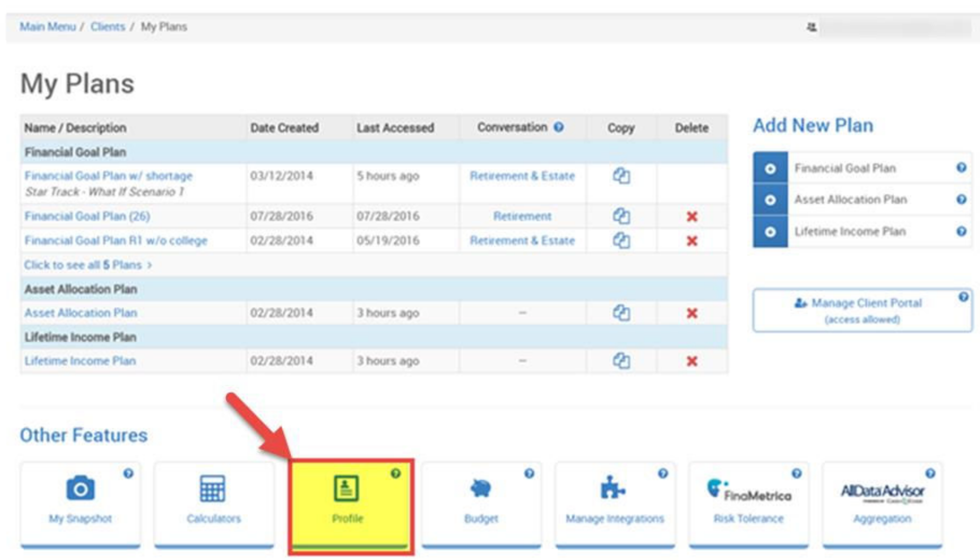
Step 4:

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).



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.



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