



## Setup Guide

# MoneyGuide in Envestnet Client Portal

**Release version:** R1 2020

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## Overview

This document describes how an advisor can enable MoneyGuide in the Client Portal of their clients. This feature will be available only if MoneyGuide integration is configured for the advisor.

## Set up MoneyGuide in Client Portal

1. Log on to the Envestnet Platform and go to the **Client List** page.
2. Search the client for whom you want to provide MoneyGuide access.

Primary Owner	Count	Client Title	Created
[Redacted]		[Redacted] y Family	Mar 2, 2020
[Redacted]		The Annuity Family	Feb 10, 2020
[Redacted]		New Holdings Test	Jan 22, 2020
[Redacted]		[Redacted] Family	Sep 30, 2016
demo1, mgp		demomgpcient	Mar 4, 2020
[Redacted]		[Redacted]	Feb 21, 2020

3. On the **General** tab click **Financial Planning** and then click **MoneyGuidePro**.

The [Redacted] Family

Financials | **General** | Service | Billing | Documents | Policy

Profile | Activity | Fiduciary Notes

+ Add Member | Analyze | Reports | Financial | Client Tools

**Financial Planning**

MoneyGuidePro

Client Title: The [Redacted] family

Rep Code

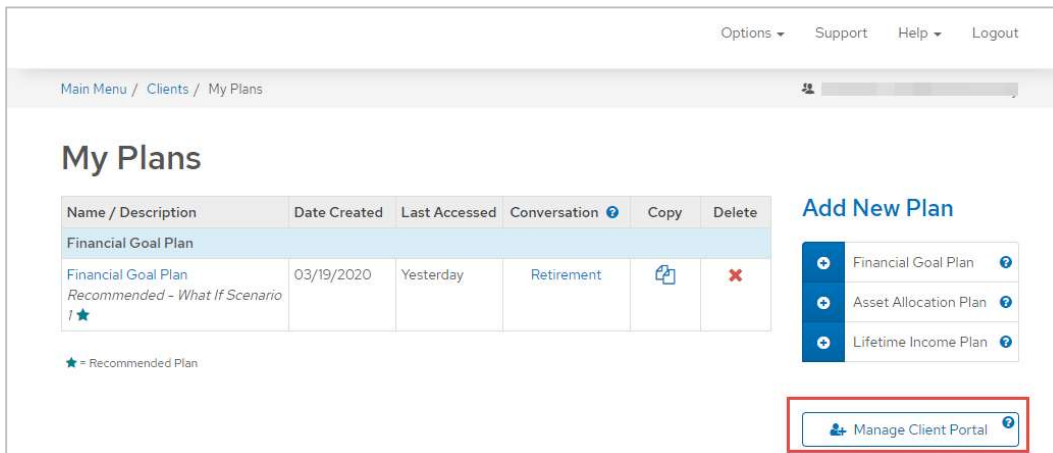
Primary Member First Name: [Redacted]

Primary Member Last Name: [Redacted]

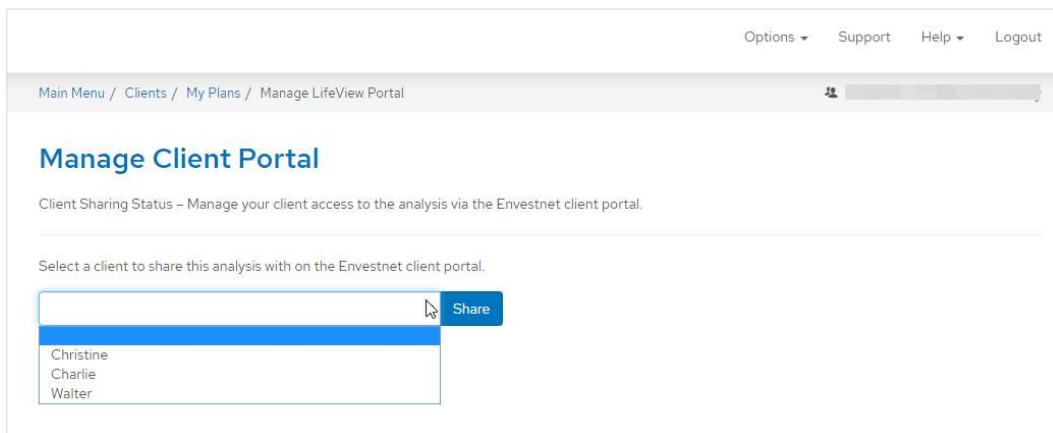
You are directed to the MoneyGuide application. By default, the **My Plans** page is displayed.

# Setup Guide: MoneyGuide in Envestnet Client Portal

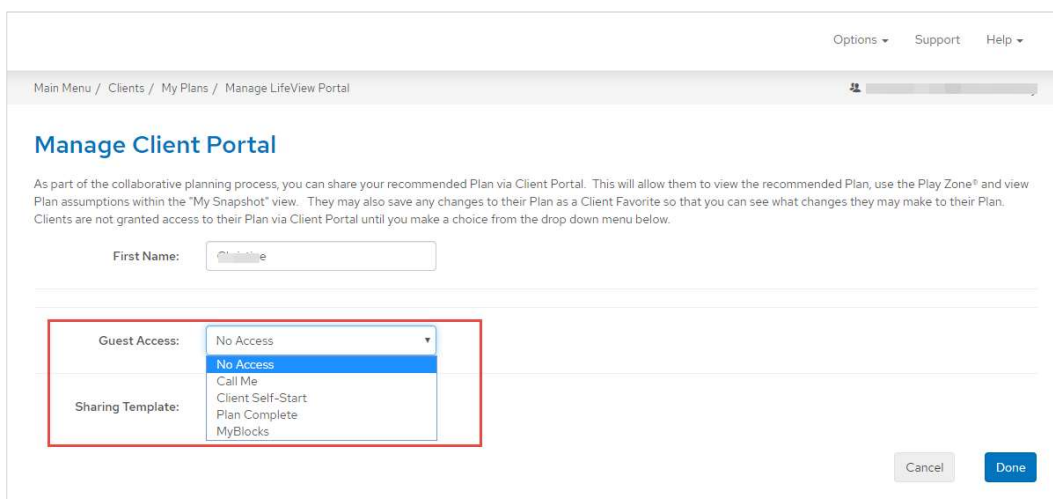
4. Click the **Manage Client Portal** button.



5. Select the client for whom you want to grant access and then click **Share**.

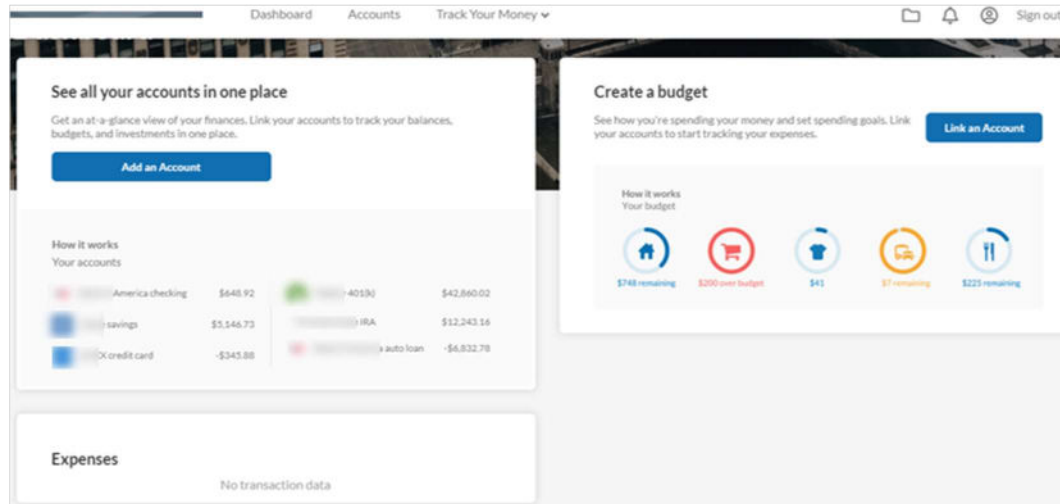


6. From the **Guest Access** dropdown list, select any one of the following options:

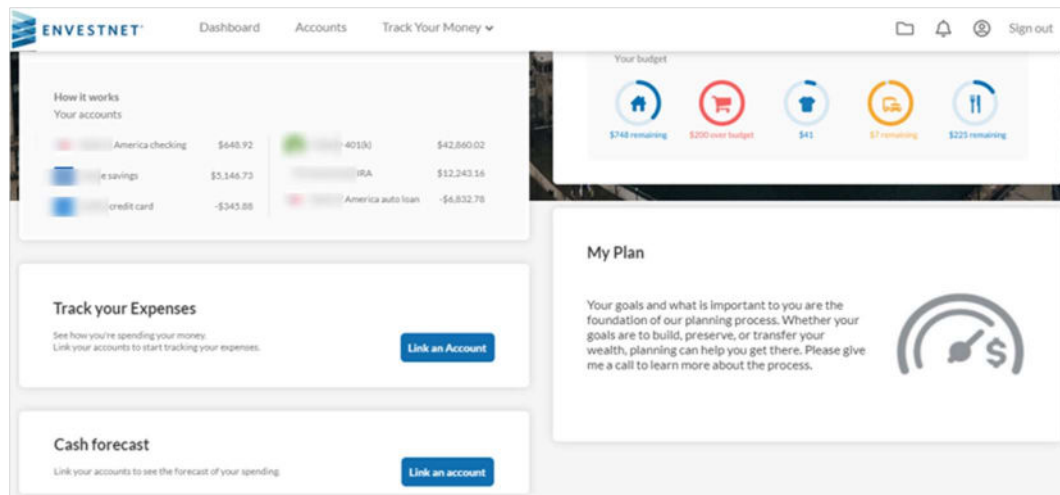


## Setup Guide: MoneyGuide in Envestnet Client Portal

- **No Access:** If you select this option, no access is provided to the MoneyGuide application. In this case, the planning tile **My Plan** on the **Dashboard** and the **My Plan** main menu are not displayed.

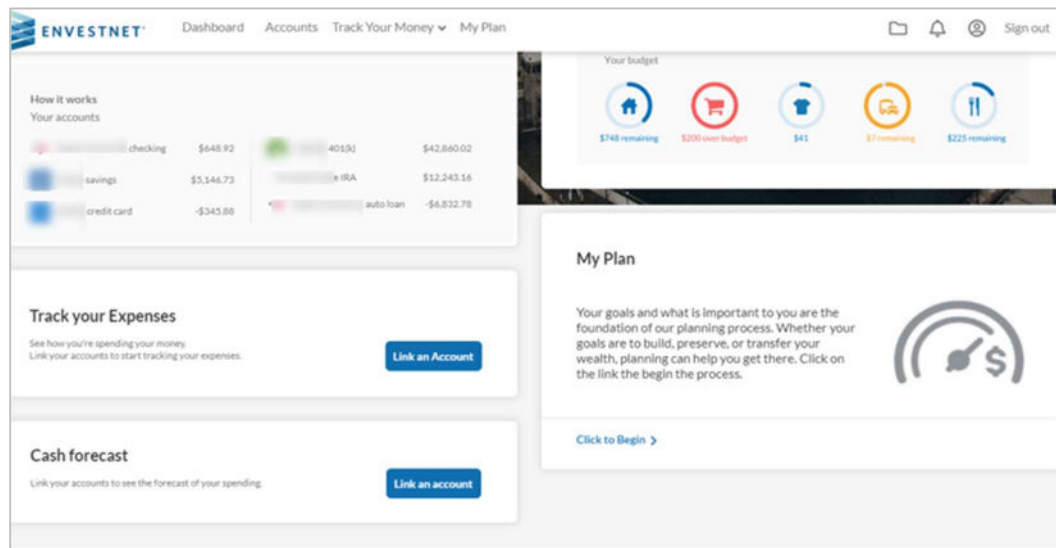


- **Call Me:** If you select this option, a static image **My Plan** is displayed on the **Dashboard**; however, the **My Plan** main menu is not displayed.

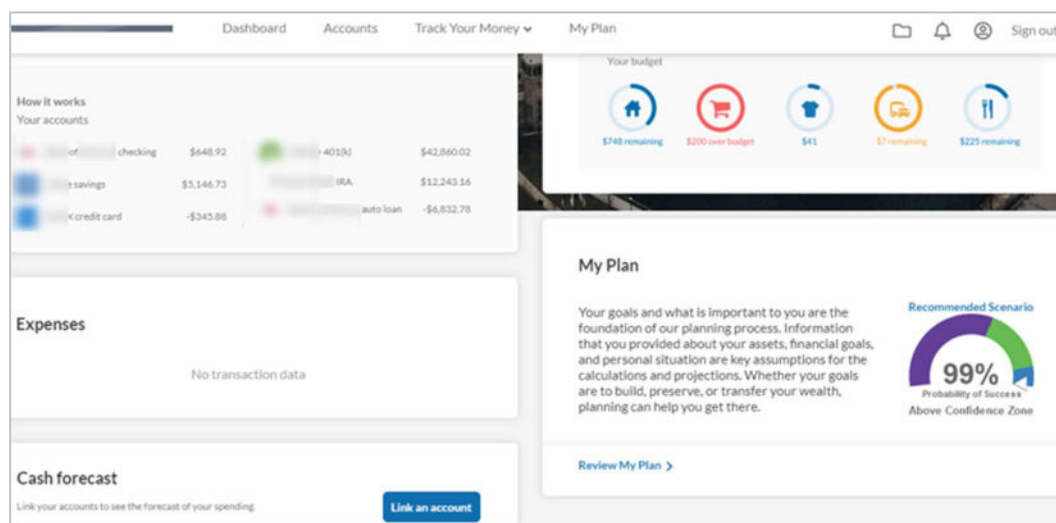


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- **Client Self-Start:** If you select this option, a static image **My Plan** is displayed on the **Dashboard** as an active link and the **My Plan** main menu is displayed in the header bar.

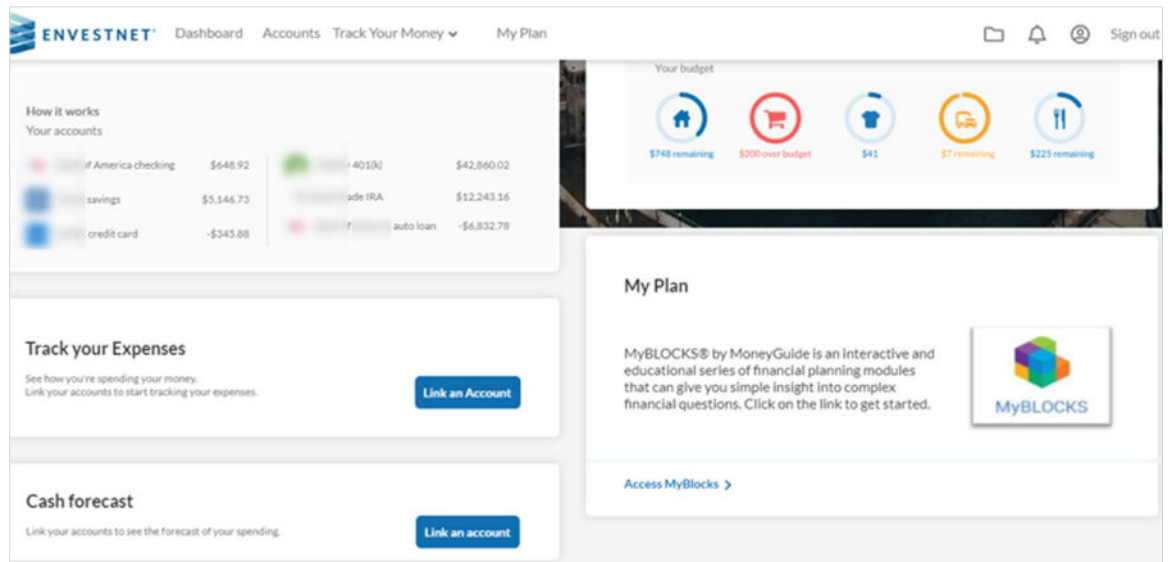


- **Plan Complete:** If you select this option, the “dynamic plan meter” planning tile is displayed on the **Dashboard** as an active link and the **My Plan** main menu is displayed.

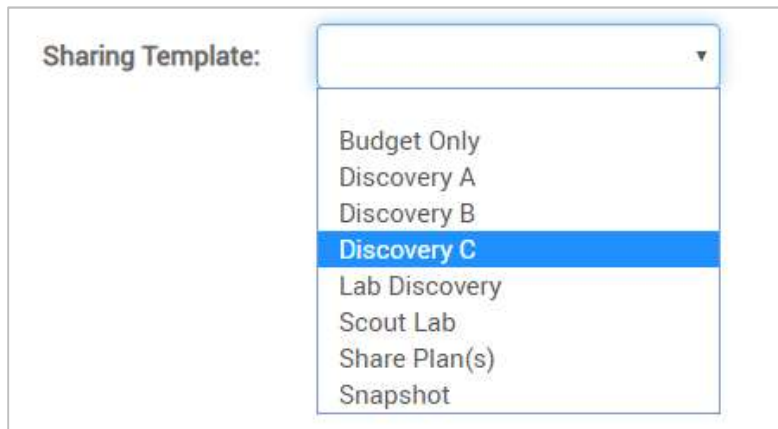


## Setup Guide: MoneyGuide in Envestnet Client Portal

- **My Blocks:** If you select this option, a static image planning tile **My Plan** is displayed on the **Dashboard** as an active link and the **My Plan** main menu is displayed.



7. Select the template you want to share. See [Sharing Templates](#) section for details.



8. After selecting all the required data, click **Done**.

## Sharing Templates

From the **Sharing Template** drop-down list, you can share any one of the following options:

- **Budget Only:** Allows clients to access the Budget module and Financial Calculators.
- **Discovery A:** Data-gathering sharing template designed for prospects. Gathers basic personal and retirement data in a quick-and-easy template.
- **Discovery B:** Data-gathering sharing template designed for the majority of clients. Gathers more detailed financial data from clients to begin creating a Recommended Scenario.
- **Discovery C:** Data-gathering sharing template designed for higher net worth clients. Gathers advanced financial data to allow for stress testing and analysis of client's complete financial picture.
- **Lab Discovery:** Enhanced data-gathering sharing template, which provides a guided planning experience. Allows clients to start making improvements to their plan while facilitating the planning process.
- **Share Plan(s):** It is the most flexible sharing template available. A customizable sharing template, which allows you to control the landing page and to decide whether the client can view or edit plan information.
- **Snapshot:** The most popular results-focused template. This interactive template allows the client to see their Recommended Scenario, track their net worth and utilize interactive tools such as Play Zone®.
- **MyBlocks®:** A feature that breaks down the financial planning into smaller, interactive modules, which allow advisors and/or clients to explore their lives and discover powerful answers to complex questions.

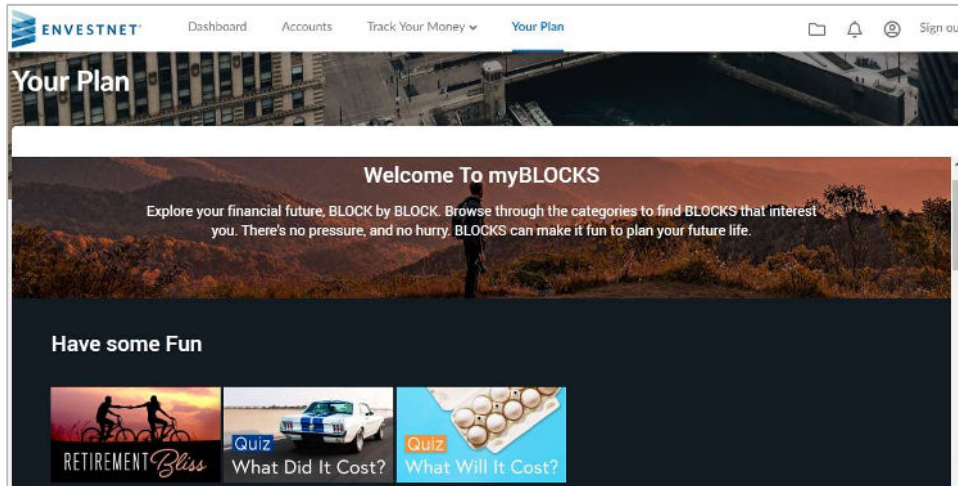


## MyBlocks® by MoneyGuide

MyBlocks® is available to clients via the Client Portal, if the advisor has a subscription and is sharing one of the following sharing templates. It can be accessed by clicking the **Your Plan** link.

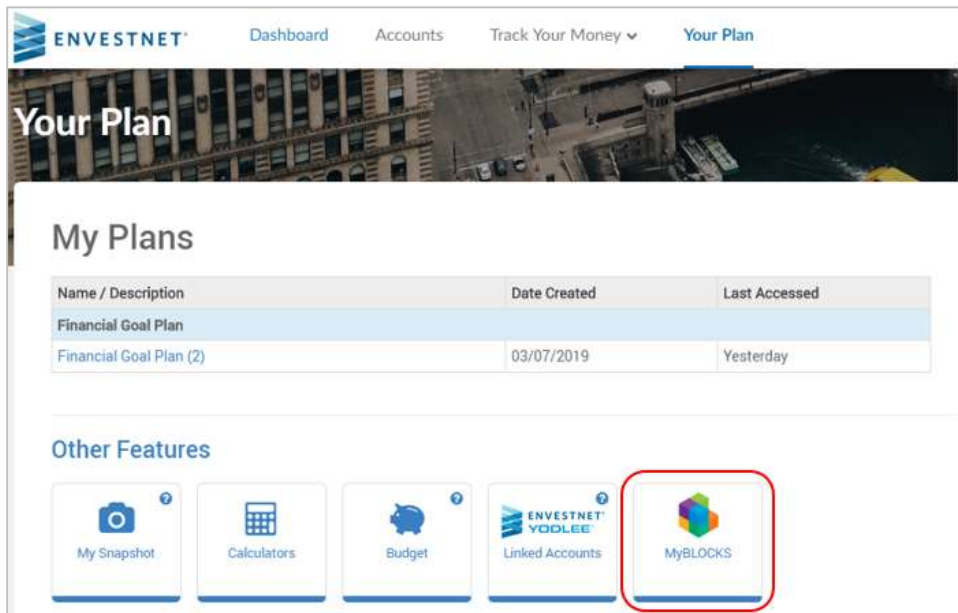
### Sharing Template: myBlocks.

For this template, **myBlocks** is the landing page.



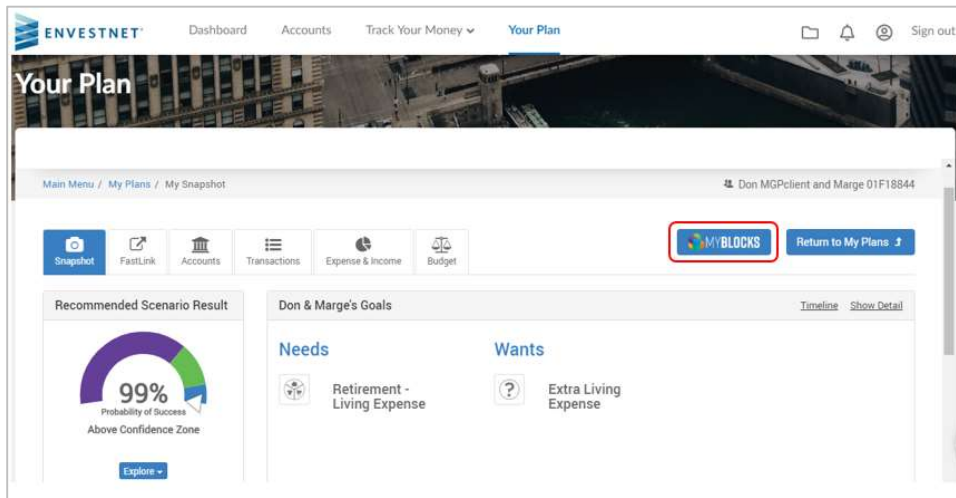
### Sharing Template: Share Plan(s)

For this template, the **MyBlocks** icon is displayed on the **My Plans** page.



## Sharing Template: Snapshot

For this template, the **MyBlocks** icon is displayed on the **Plan Summary** page.



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