

WealthVision Quick Guide



Copia Financial subscribes to WealthVision, eMoney's industry leading financial planning and data aggregation platform. It is a highly sophisticated tool for the creation of financial planning projections and "what if" scenarios that drive recommendations and enhance decision making; a site for ready access to current information for both advisor and client; and a portal for secure and convenient file and information sharing.

Logging in: The most convenient method to log in to WealthVision is through the "Single Sign In" feature of LPL Account View:

- Go to <https://myaccountviewonline.com/login/>, enter your username, click "Next"
- Enter your password. If you don't recall your password, click "Forgot Password"
- Once you are logged in to AccountView, click the "WealthVision" tab (upper right)

Note: For Account View 2.0 users, the WealthVision tab is bottom left. We will be introducing Account View 2.0 (and its new mobile app feature) to all clients during 2022!

Linking 3rd Party (non-Copia) Accounts: Any financial asset or debt that is accessible via a website can potentially be securely linked to WealthVision for daily updates.

- From the "Home" screen on WealthVision, click the dropdown arrow to the right of any category of accounts (e.g. Cash, Credit Cards, Taxable, etc).
- Click the "Link Account" box for any and all accounts you access through a website, enter the name or website address for the institution, and follow the directions, starting with entering username and password, and if applicable, responding to two-factor authentication instructions.
- Some smaller or regional institutions may not yet be set up to accommodate data aggregation. If this is the case, let us know. We will add them to a list of firms that eMoney will monitor for future access.
- When fixing or updating previously established connections, click on the yellow "attention" icon  to the right of the account name, click on "Click to fix" and follow instructions.

WealthVision Quick Guide



Sharing documents securely: Secure and accessible file sharing enhances our ability to provide timely and accurate advice, as conveniently as possible for our clients.

- From the “Home” screen on WealthVision, click on the blue “Vault” link at the top of your screen (to the right of the Copia logo, between “Reports” and “Investments”).
- Click on “Shared Documents” on the left of your screen to open that folder
- On the upper right of your screen, click “Upload” and a drop down menu will appear, offering the ability to upload either individual files, or an entire folder from your computer.
- Navigate to the location of the desired file or folder you wish to share and once selected, click “Open” on the lower right. When files or folders are uploaded to the shared documents folder in the vault, we will receive an email notifying us.

Other Resources:

- From any screen on WealthVision, click the “Help” link (upper right, next to “Settings”). You will be offered a selection of topics to choose from related to your location on the website. Clicking on any topic will generate a walk-through tutorial on accomplishing that task, offer an interactive tour, or direct you to a detailed PDF document.
- For more on security and encryption and for step-by-step screen shots for linking 3rd party accounts, visit www.CopiaFinancial.com/WealthVision.5.htm

As always, should you have any questions, difficulty accessing or navigating WealthVision or linking accounts on the platform, please send us an email or give us a call. We appreciate your business and are here to help.