



COLONIAL TRUST

Setting Alerts

This training guide will demonstrate how to set up alerts around your financials tied in to your personal financial management site!

Please Note: Your advisor has the ability to customize which alerts are available to you on your website.

1. From your Home page, click Settings.

The screenshot shows the eMoney Advisor website interface. The top navigation bar includes links for Home, Organizer, Workshop, Spending, Investments, Vault, Reports, Help, **Settings** (circled in red), and Sign Out. The main dashboard is titled "FINANCIAL ALERTS" and "MANAGE ALERTS".

ACCOUNTS + Add

Cash	\$7,568	>
Credit Cards	-\$2,368	>
Investments	\$186,067	>
Life Insurance	\$14,500	>
Loans	-\$426,385	>
Property	\$1,080,000	>
Stock Options	\$1,239,505	>


NET WORTH TODAY
\$2,098,887
THIS MONTH -- --

INVESTMENTS TODAY
\$268,171
CHANGE² +\$737.99 +0.28%

SPENDING NET -\$613
You've spent \$613 this month.
Pie chart showing: Taxes (blue), Cash/ATM (green), Business (yellow). More >

BUDGETS UNDER \$4,768
21 days remaining this month.
Progress bar: \$0 to \$5,021. Current: \$253. May 10.

PROTECTION
Variable Universal Life \$1,000,000
eMoney Advisor Source (E... More

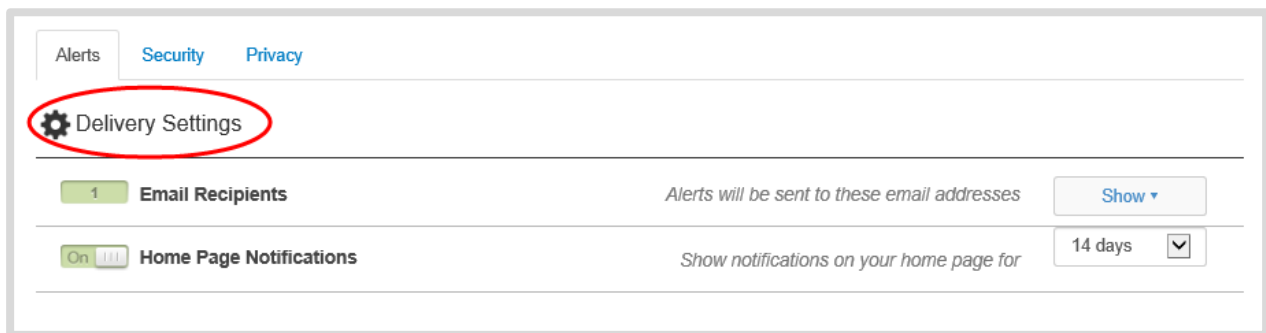
TOUR GUIDE
Get an overview of how to get started with your personal financial website.
GET STARTED > 

Setting Alerts

- The Delivery Settings allow you to permission alerts being sent to an email and if you want to be notified on your home page that an alert has been triggered.

To add an email recipient, click the **Add/Show** drop down and enter in the recipients email. Click the Plus sign when complete.

toggling **ON** Home Page Notifications allows you to see triggered alerts for a set number of days before they expire.



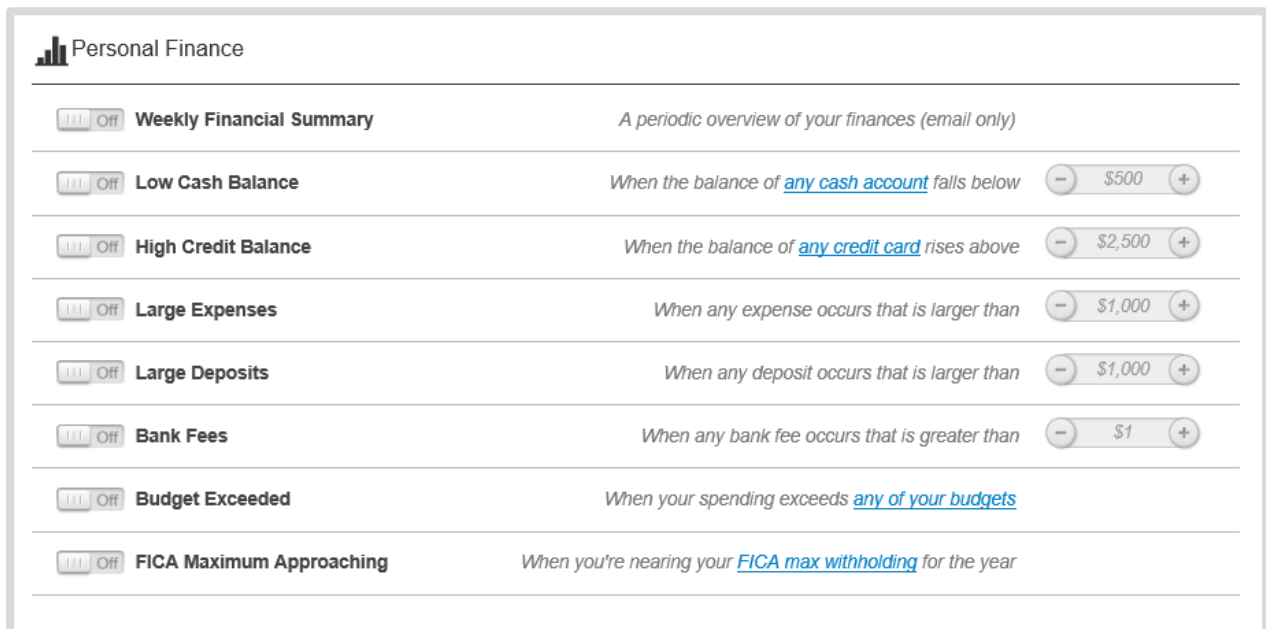
Alerts Security Privacy

Delivery Settings

1 Email Recipients Alerts will be sent to these email addresses Show ▾

On Home Page Notifications Show notifications on your home page for 14 days ▾

- Personal Financial Alerts allow you to set up notifications for things relevant to your financials – these alerts are tied to the spending information brought over through Accounts. To add accounts directly from a financial institution, please refer to the Adding Accounts user guide.



Personal Finance

Off Weekly Financial Summary A periodic overview of your finances (email only)

Off Low Cash Balance When the balance of [any cash account](#) falls below

Off High Credit Balance When the balance of [any credit card](#) rises above

Off Large Expenses When any expense occurs that is larger than

Off Large Deposits When any deposit occurs that is larger than


Off Bank Fees When any bank fee occurs that is greater than

Off Budget Exceeded When your spending exceeds [any of your budgets](#)

Off FICA Maximum Approaching When you're nearing your [FICA max withholding](#) for the year

Setting Alerts

4. Investments alerts are relating to the underlying investment holdings in your portfolio.

 Investments

Off **Investment Activity** *When specific types of [investment transactions](#) occur*


Off **Unbalanced Portfolio** *When your investment portfolio is out of balance [by more than](#):*

Off **Concentrated Position** *When a stock or bond makes up [more than this much](#) of your portfolio:*

Off **Excess Cash Position** *When cash makes up [more than this much](#) of your portfolio:*

Off **Security Prices** *[Monitor the prices](#) of stocks and mutual funds*

5. Reminders are date based alerts.

 Reminders

Off **End of Year Planning** *Annual financial housekeeping tips*

Off **Insurance Policy Anniversary** *Annual reminder of policy renewal date*

Off **Tax Filing Dates** *When tax filing dates are approaching*

Off **Frank's Social Security Benefits** *[When Frank is approaching age](#)*

Off **Joanna's Social Security Benefits** *[When Joanna is approaching age](#)*

Off **Required Minimum Distributions** *Annual reminder to meet your [RMD requirements](#)*

Off **Important Dates** *Birthdays, anniversaries, or any other date you want to remember*