



# eMONEY

ORGANIZE. ANALYZE. COLLABORATE.

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helping you **PLAN** for the future

**eMoney** is an online financial planning platform designed to optimize a path to help you achieve your financial goals to and through retirement. This technology is offered by WEA Financial Advisors, Inc., to WEA Member Benefits' 403(b) plan participants. Having a Member Benefits 403(b) account with a balance is required to maintain the eMoney membership.

### WEA MEMBER BENEFITS FINANCIAL ADVISORS

**We are your financial advocate.** We take the time to understand your financial goals and employ a comprehensive planning approach combined with sophisticated technology designed to optimize your results and help achieve your financial goals.

Our financial advisors have years of experience helping Wisconsin public educators achieve their financial goals. We believe your financial information should be organized, up to date, easy to understand, and accessible to you whenever you want, from wherever you are.

We understand that unexpected events and life changes can impact your dreams. **eMoney** allows you to monitor and track your progress every day—and we'll be there to help you adjust your financial plans along the way.

### HOW TO GET STARTED WITH eMONEY

We start by identifying your retirement and financial goals.

From there we'll work with you to evaluate your options and recommend strategies to help you reach your goals. Using **eMoney**, you can monitor your financial situation to help stay on target to achieve your future goals.



## Let's get started!

Fill out the short form here: [weabenefits.com/emoney](https://weabenefits.com/emoney)

## HOW eMONEY CAN HELP

**eMoney** uses a comprehensive view of your financial picture to help you develop a deeper understanding of what is required to achieve your financial goals.

### ▶ **Complete Financial Picture**

Link your financial accounts to provide an up-to-date picture of your financial situation and to help ensure our analyses and recommendations reflect current market conditions.

### ▶ **Monitor Progress**

Use the daily progress snapshots and alerts to help remind you to stay on track toward achieving your financial goals. The snapshots and alerts relieve some of the organizational stress, allowing you to focus on other important parts of life.

### ▶ **Increased Collaboration**

Collaborate from anywhere with the WEA Member Benefits financial advising team, using **eMoney** for a secure view of your financial progress.



### **Protect your important documents**

With **eMoney**, you can store and organize your important financial documents in the vault so they are accessible to you 24/7. The vault features unlimited storage.

#### **Store important documents like:**

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Legal documents    | <input type="checkbox"/> Liabilities    | <input type="checkbox"/> Family                         |
| <input type="checkbox"/> Benefits           | <input type="checkbox"/> Taxes          | <input type="checkbox"/> Property                       |
| <input type="checkbox"/> Insurance policies | <input type="checkbox"/> Identification | <input type="checkbox"/> Bank and investment statements |

## FEATURES OF eMONEY

eMoney makes your life easier by providing unique services for staying organized, updated, and prepared.



### Organizer

Connect your accounts for a consolidated view of your financial picture.



### Track Spending

Know how much you're spending and where you're spending it.



### Investments

Interactive charts/views help you monitor your accounts.



### Screen Sharing

Easily join a screen sharing session for interactive planning anytime, anywhere.



### Reporting

Create and save your own reports and view reports completed by your advisor.



### Budgeting Tools

Use the tools to help set your budgets and reach your savings goals.



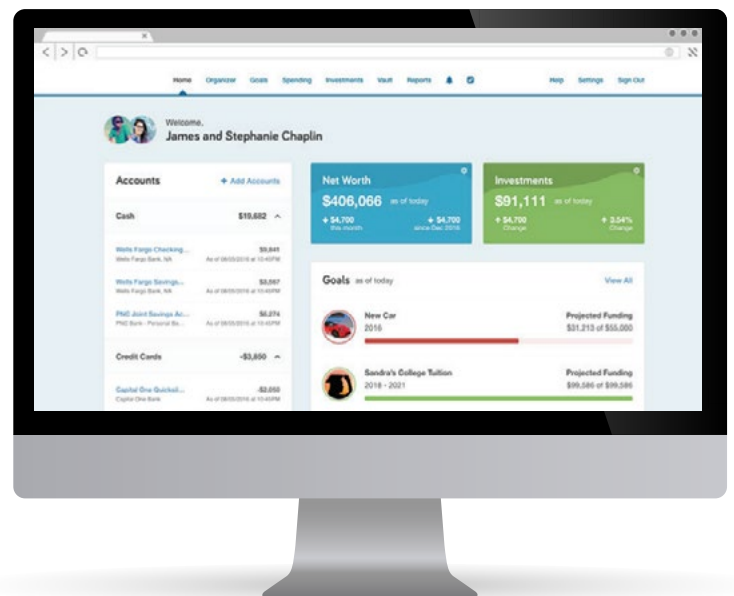
### Mobile

Access to your financial picture available on your smart phone.



### Goals

See if you're on target to reach your prioritized financial goals.



## ABOUT WEA MEMBER BENEFITS

WEA Member Benefits helps Wisconsin public school employees and their families achieve their financial goals by providing personal insurance, retirement and investment, and financial planning programs that are designed specifically for the education community.

## WEA MEMBER BENEFITS ADDITIONAL PROGRAMS

### *Personal Insurance*

Our personal insurance programs provide you with, industry-leading coverages, fair premium rates, exceptional service, and access to experienced consultants you can trust.

- ▶ Auto
- ▶ Home
- ▶ Condo
- ▶ Renters
- ▶ Umbrella
- ▶ Long-Term Care
- ▶ Life
- ▶ Medicare Supplement

### *Retirement and Investment*

Our savings programs provide you with flexible investment options, low fees, and access to our savings consultants.

- ▶ 403(b)
- ▶ Traditional/Roth IRA

### *Financial Planning*

- ▶ Financial Planning Services
- ▶ Personal Investment Accounts

## LET'S CONNECT!

Follow us online for tips and info on financial wellness.



This brochure is for informational purposes only and is not intended to constitute legal, financial, or tax advice. Certain recommendations or guidelines may not be appropriate for everyone. Consult your personal advisor or attorney for advice specific to your unique circumstances before taking action. All financial advisory services are offered through WEA Financial Advisors, Inc., an SEC registered investment advisor. The 403(b) retirement program is offered by the WEA TSA Trust. TSA and IRA program registered representatives are licensed through WEA Investment Services, Inc., member FINRA. Property and casualty insurance programs are underwritten by WEA Property & Casualty Insurance Company. The terms and conditions of your coverage are exclusively controlled by your written policy. Please refer to your policy for details. Certain policy exclusions and limitations may apply. The life, long-term care, and Medicare supplement insurance programs are offered and administered by Associates of Clifton Park. Insurance products are underwritten by multiple insurance carriers.

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