MoneyGuidePro®

Asset-Map

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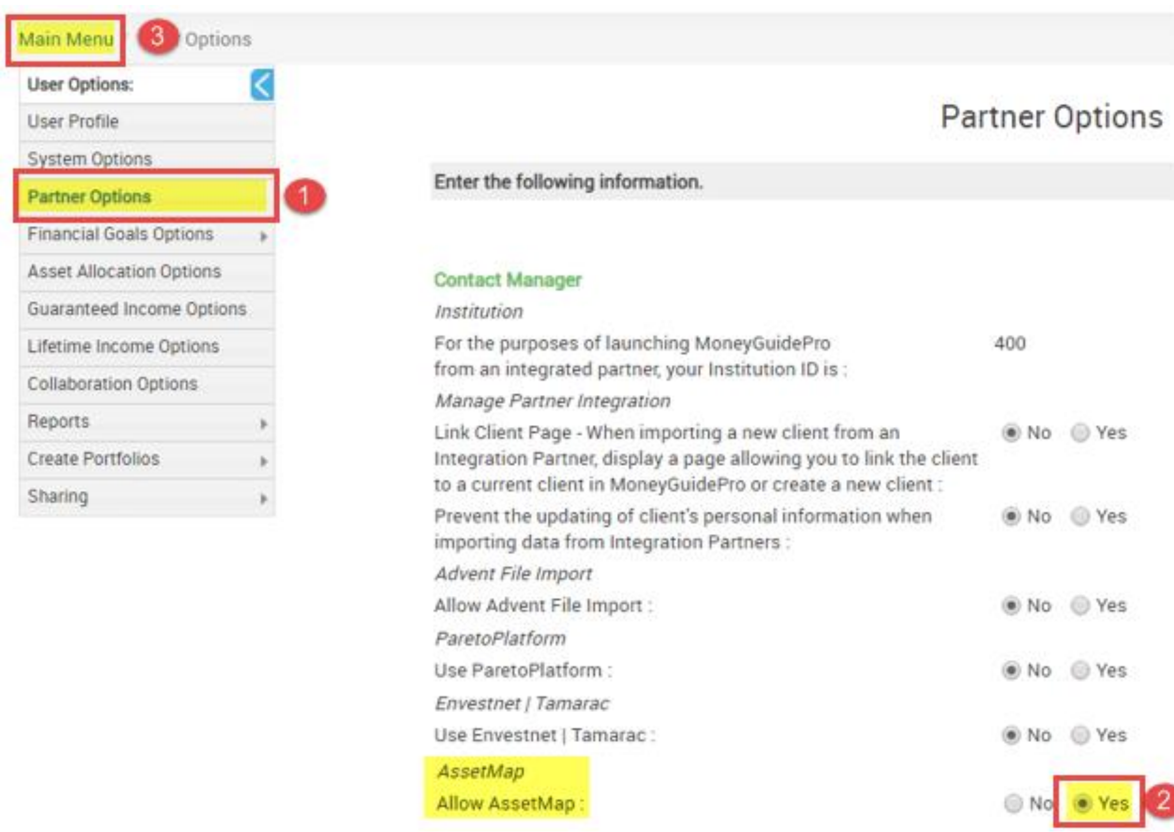
Setting up link between MoneyGuidePro and Asset-Map.

Step 1:

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

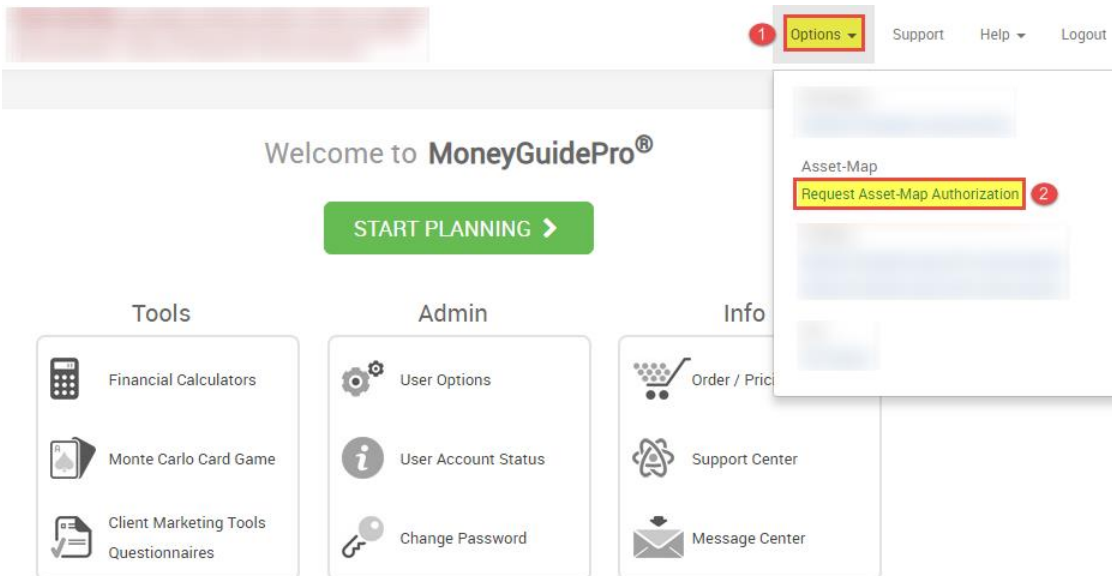
Step 2:

Select Partner Options (1) on the left menu and scroll down to the section for Asset-Map. Verify the radio button is set to "Yes" (2) and then select Main Menu (3).



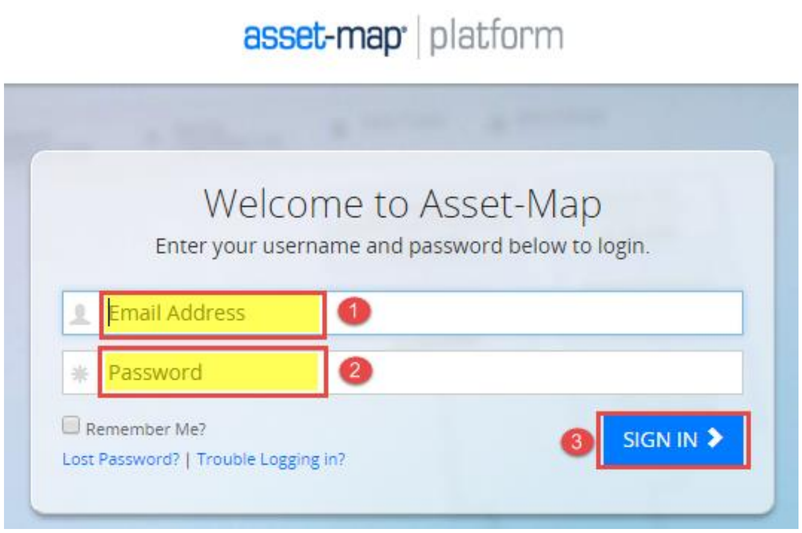
Step 3:

From the Main Menu select Options (1) and then select the Request Asset-Map Authorization link (2).



Step 4:

Enter your Asset-Map email address (1) Password (2) and then select the Sign In button (3).



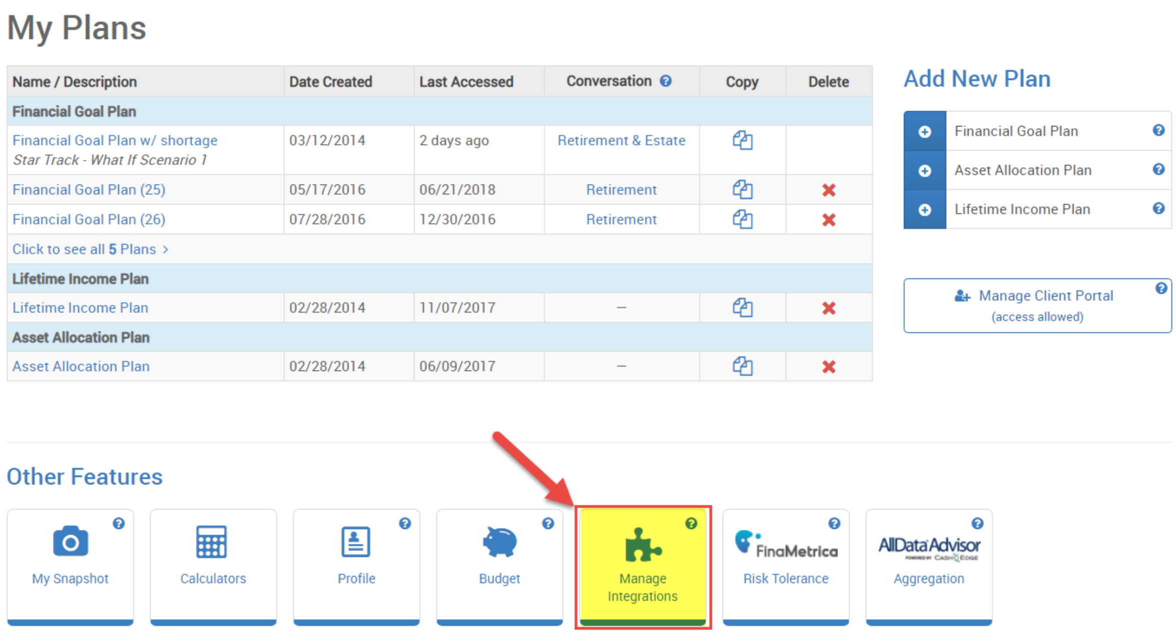
You have now completed the setup from MoneyGuidePro to Asset-Map. See the following section to send client accounts from MoneyGuidePro to Asset-Map.

MoneyGuidePro®

Linking Households in Asset-Map with MoneyGuidePro and sending accounts to Asset-Map.

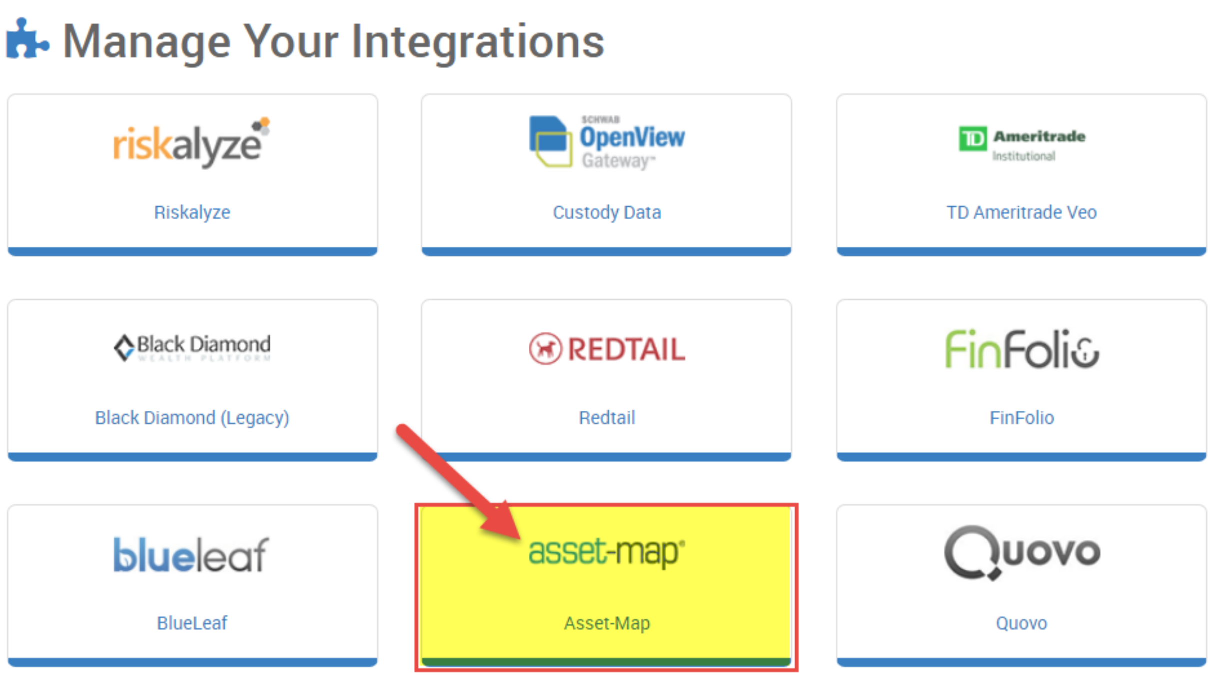
Step 1:

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



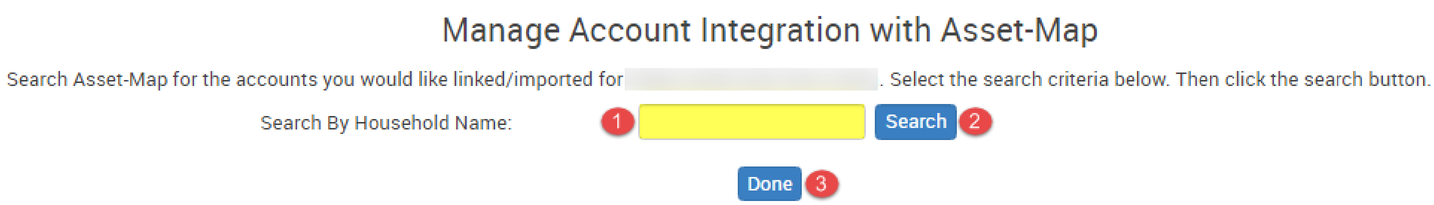
Step 2:

Select the Asset-Map button.



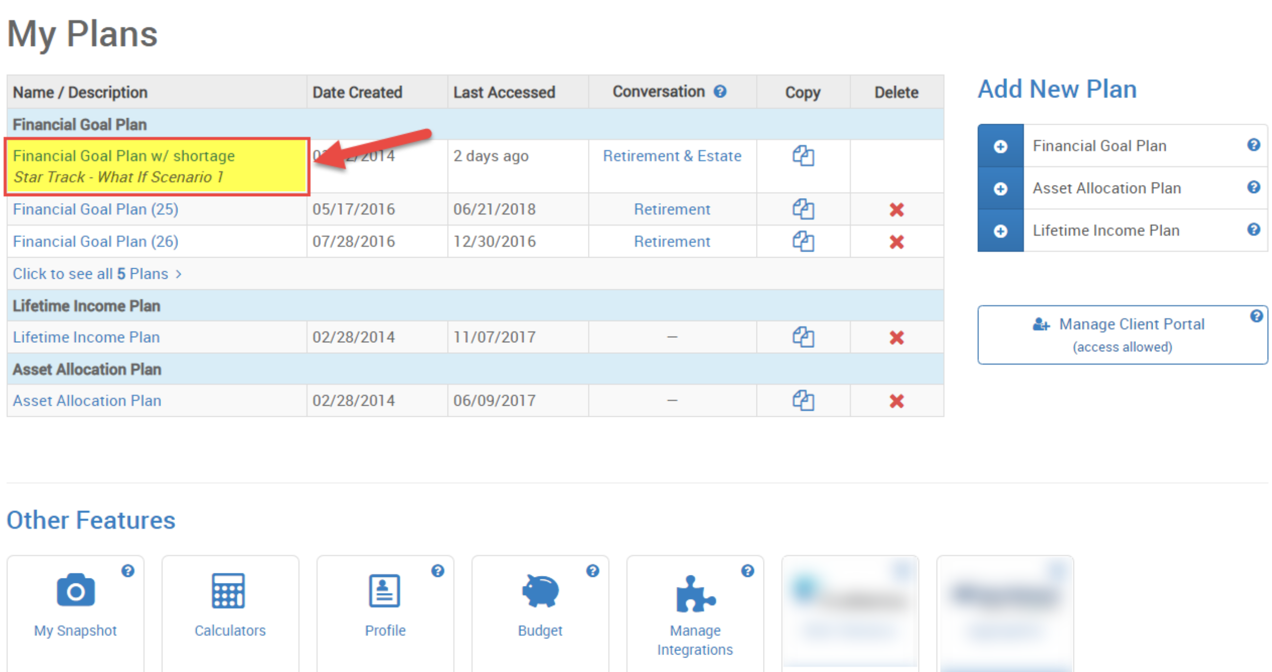
Step 3:

Use the search field to enter the household name you would like to link with MoneyGuidePro (1), select the Search button (2), select Done (3).



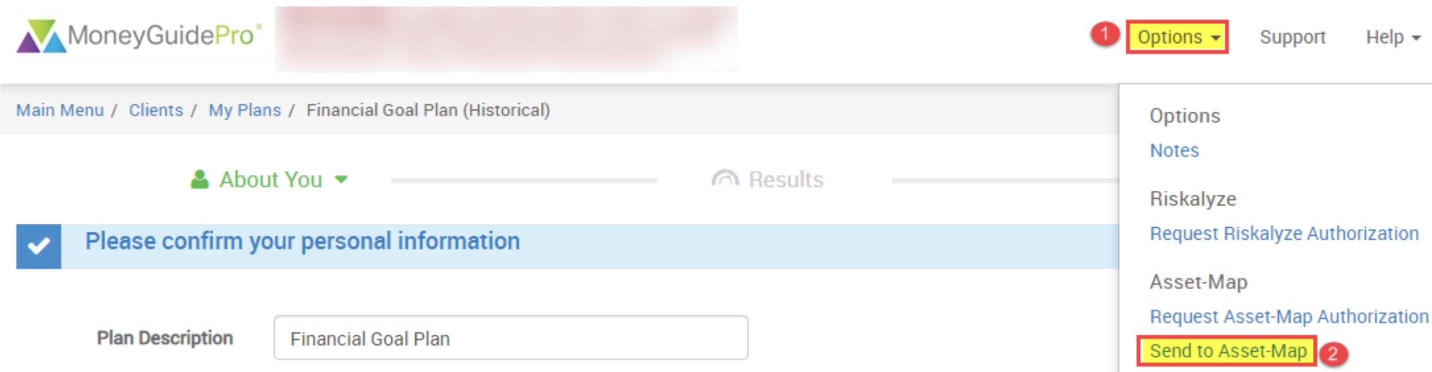
Step 4:

From the My Plans page select the Financial Goal Plan you wish to send assets from to Asset-Map.



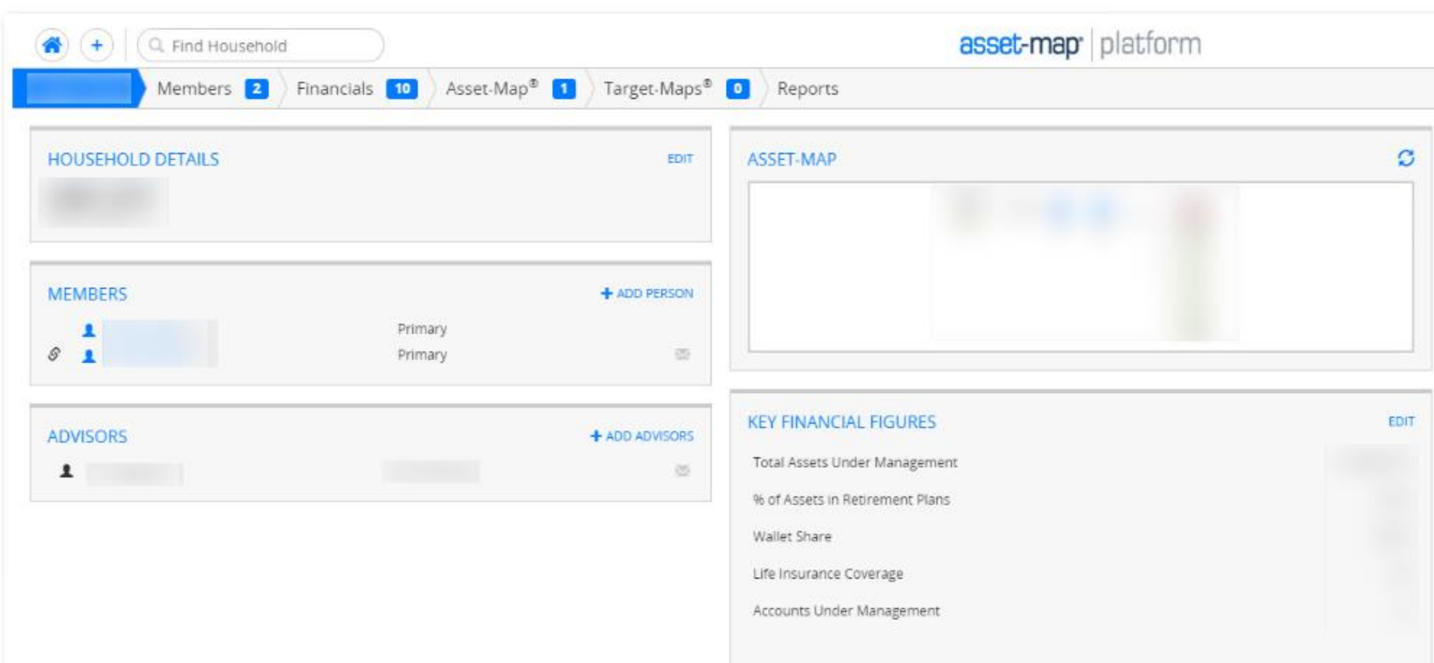
Step 5:

Select Options in the upper right of the screen (1), then select the Send to Asset-Map link (2). This will send the assets for this plan in MoneyGuidePro to Asset-Map and Single Sign On you to their platform.



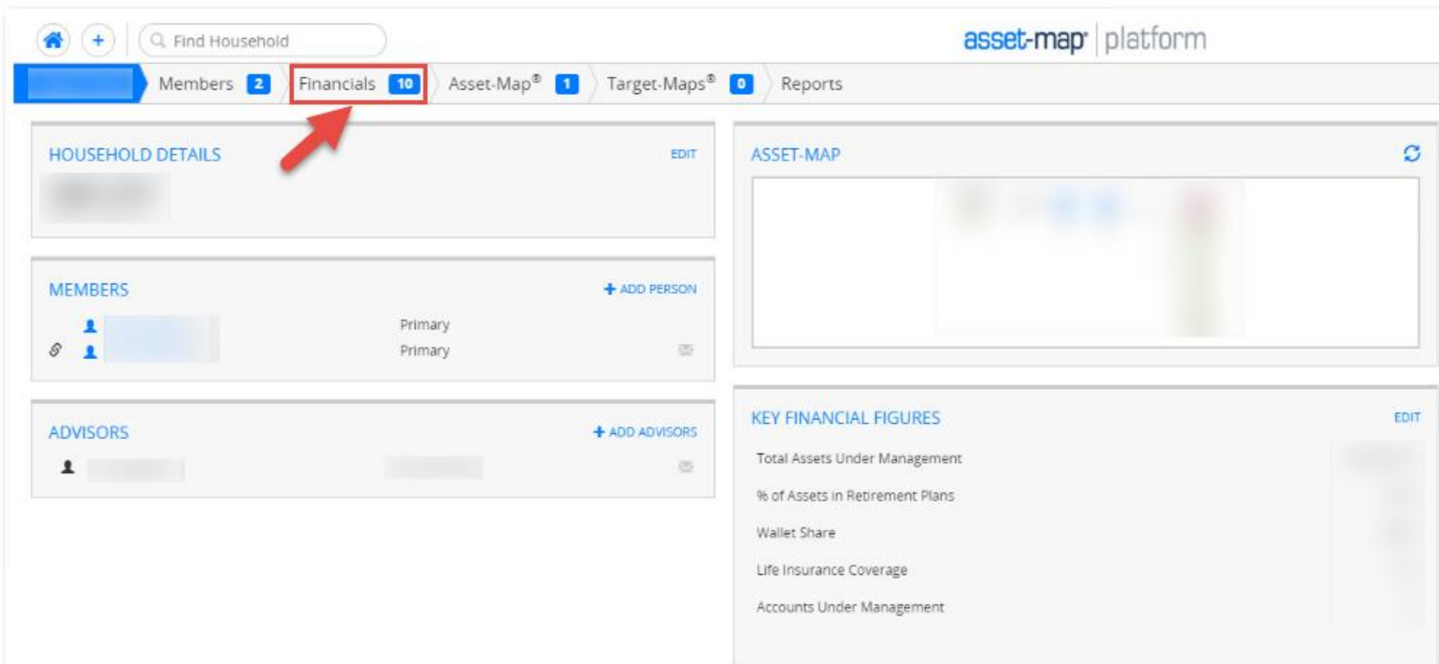
Step 6:

You will land on the linked client's page within Asset-Map.



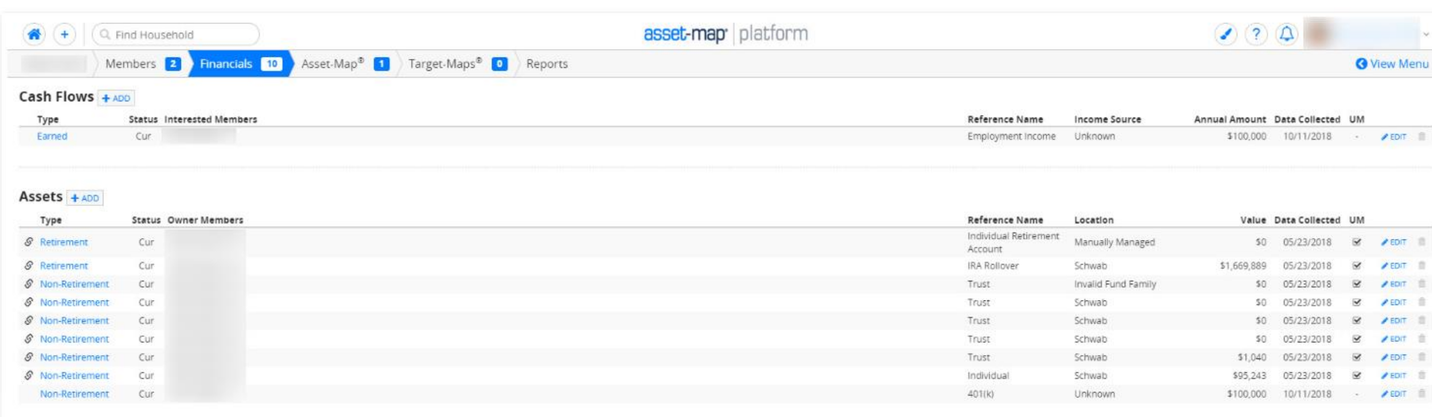
Step 7:

To see the individual accounts that were linked, select Financials from the toolbar.



Step 8:

On this page you will be able to see the assets for the linked client.



If you would like to update the account data going to Asset-Map or link additional accounts that are in MoneyGuidePro, repeat Step 5 of this section.