

Asset-Map

# Asset-Map

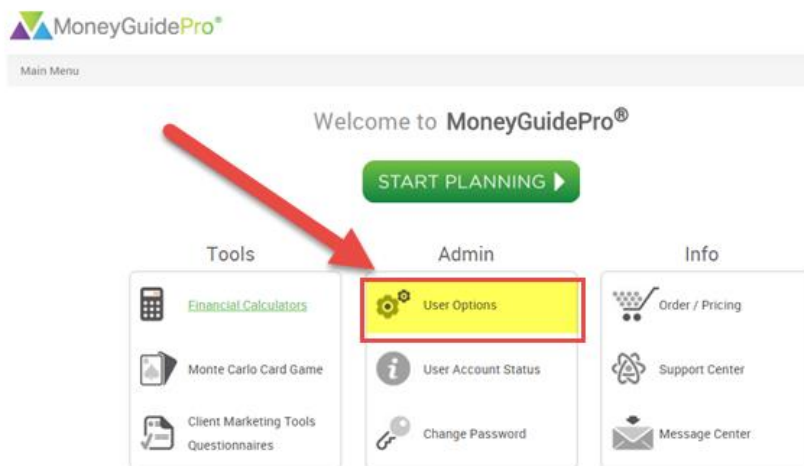
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## Setting up link between MoneyGuidePro and Asset-Map.

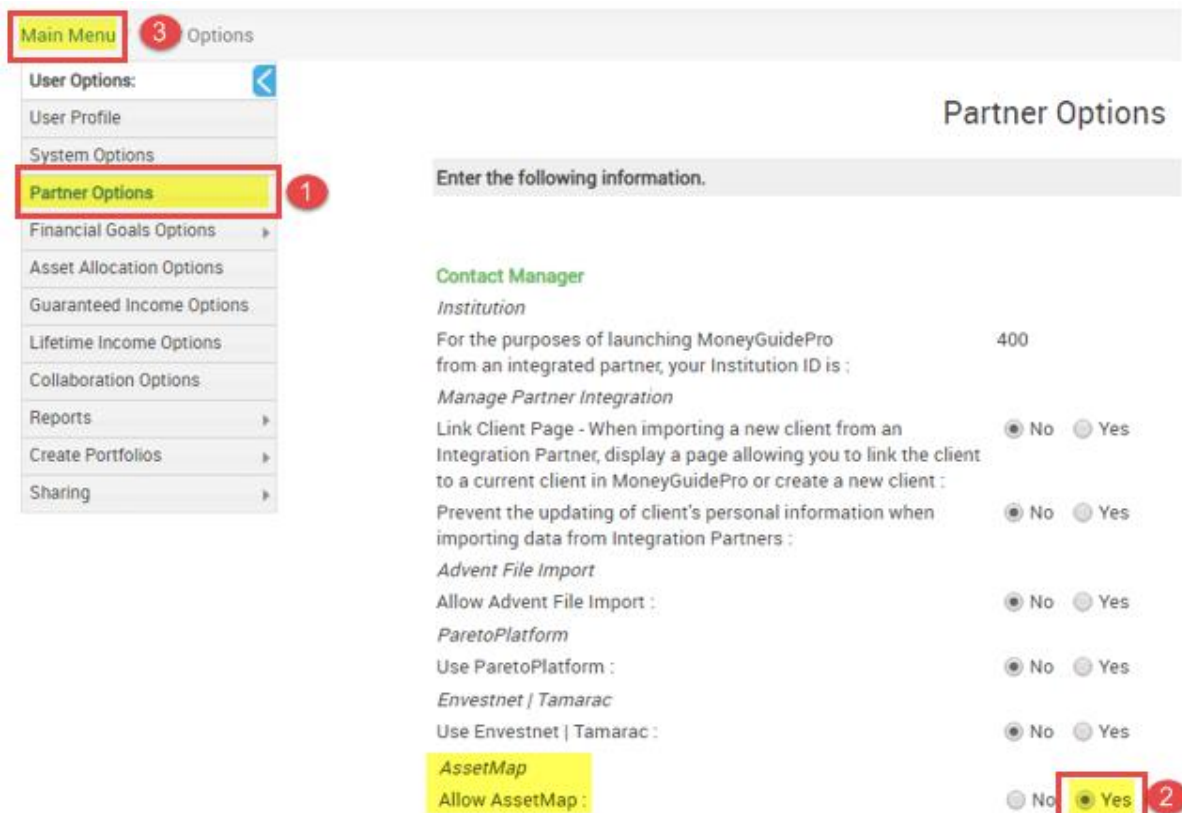
### Step 1:

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



### Step 2:

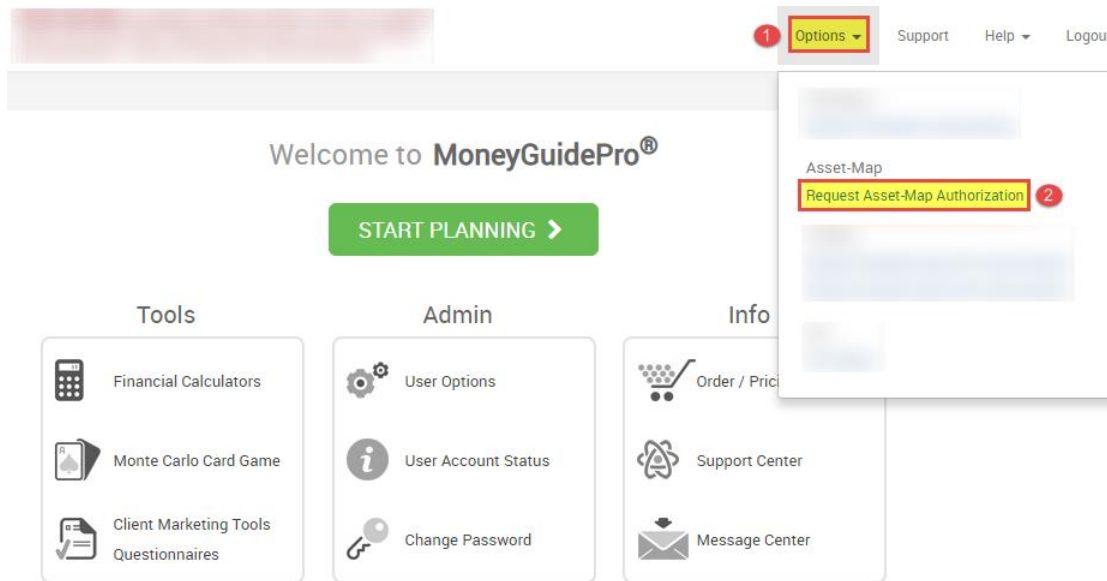
Select Partner Options (1) on the left menu and scroll down to the section for Asset-Map. Verify the radio button is set to “Yes” (2) and then select Main Menu (3).





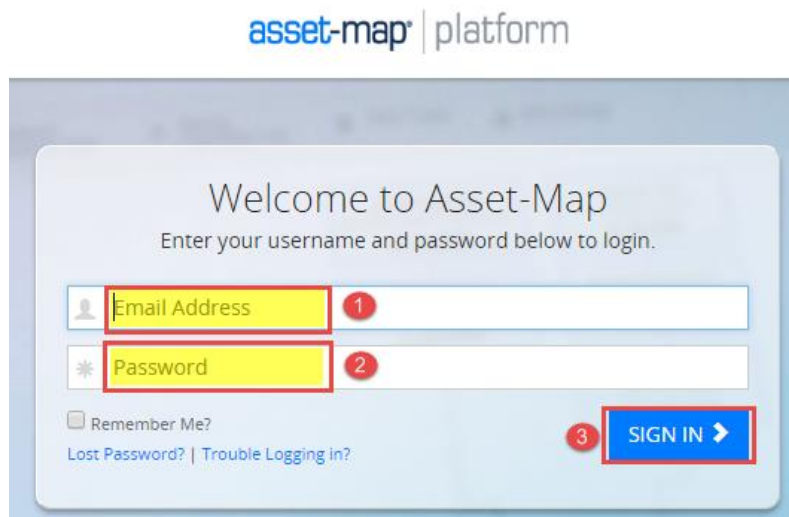
## Step 3:

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.

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.

## My Plans

Name / Description	Date Created	Last Accessed	Conversation ⓘ	Copy	Delete
<b>Financial Goal Plan</b>					
Financial Goal Plan w/ shortage <i>Star Track - What If Scenario 1</i>	03/12/2014	2 days ago	Retirement & Estate		
Financial Goal Plan (25)	05/17/2016	06/21/2018	Retirement		✖
Financial Goal Plan (26)	07/28/2016	12/30/2016	Retirement		✖
Click to see all 5 Plans >					
<b>Lifetime Income Plan</b>					
Lifetime Income Plan	02/28/2014	11/07/2017	—		✖
<b>Asset Allocation Plan</b>					
Asset Allocation Plan	02/28/2014	06/09/2017	—		✖

### Add New Plan

- Financial Goal Plan ⓘ
- Asset Allocation Plan ⓘ
- Lifetime Income Plan ⓘ

Manage Client Portal ⓘ  
(access allowed)

### Other Features

My Snapshot ⓘ

Calculators

Profile ⓘ

Budget ⓘ

Manage Integrations ⓘ

FinaMetrica ⓘ  
Risk Tolerance

AllDataAdvisor ⓘ  
Aggregation

### Step 2:

Select the Asset-Map button.

## Manage Your Integrations

Riskalyze

Custody Data

TD Ameritrade Veo

Black Diamond (Legacy)

Redtail

FinFolio

BlueLeaf

Asset-Map

Quovo

### 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).

## Manage Account Integration with Asset-Map

Search Asset-Map for the accounts you would like linked/imported for . Select the search criteria below. Then click the search button.

Search By Household Name:

1

Search

2

Done

3

### Step 4:

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

## My Plans

Name / Description	Date Created	Last Accessed	Conversation ?	Copy	Delete
<b>Financial Goal Plan</b>					
Financial Goal Plan w/ shortage <i>Star Track - What If Scenario 1</i>	02/28/2014	2 days ago	Retirement & Estate		
Financial Goal Plan (25)	05/17/2016	06/21/2018	Retirement		
Financial Goal Plan (26)	07/28/2016	12/30/2016	Retirement		
Click to see all 5 Plans >					
<b>Lifetime Income Plan</b>					
Lifetime Income Plan	02/28/2014	11/07/2017	—		
<b>Asset Allocation Plan</b>					
Asset Allocation Plan	02/28/2014	06/09/2017	—		

## Add New Plan

	Financial Goal Plan	
	Asset Allocation Plan	
	Lifetime Income Plan	

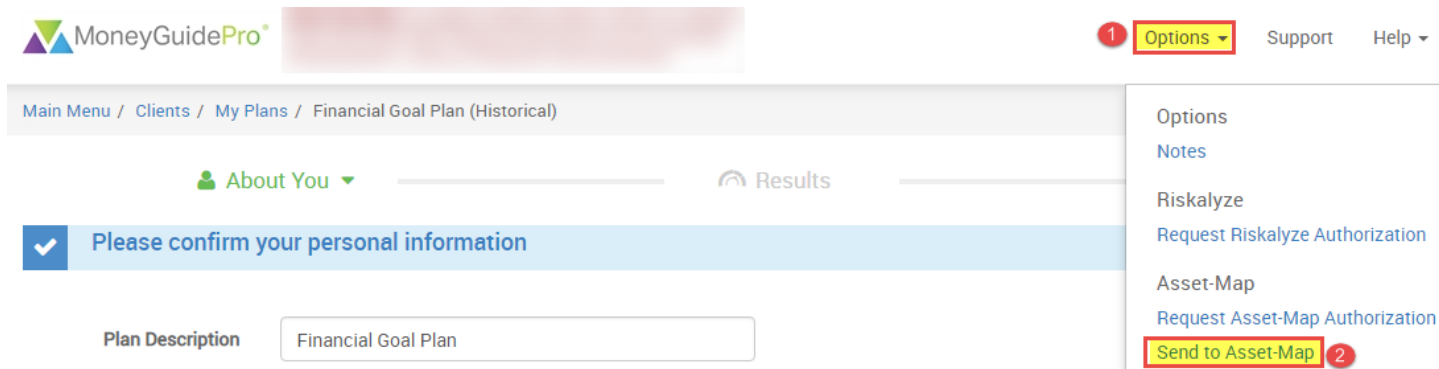
	Manage Client Portal	
(access allowed)		

## Other Features

My Snapshot	Calculators	Profile	Budget	Manage Integrations		

## Step 5:

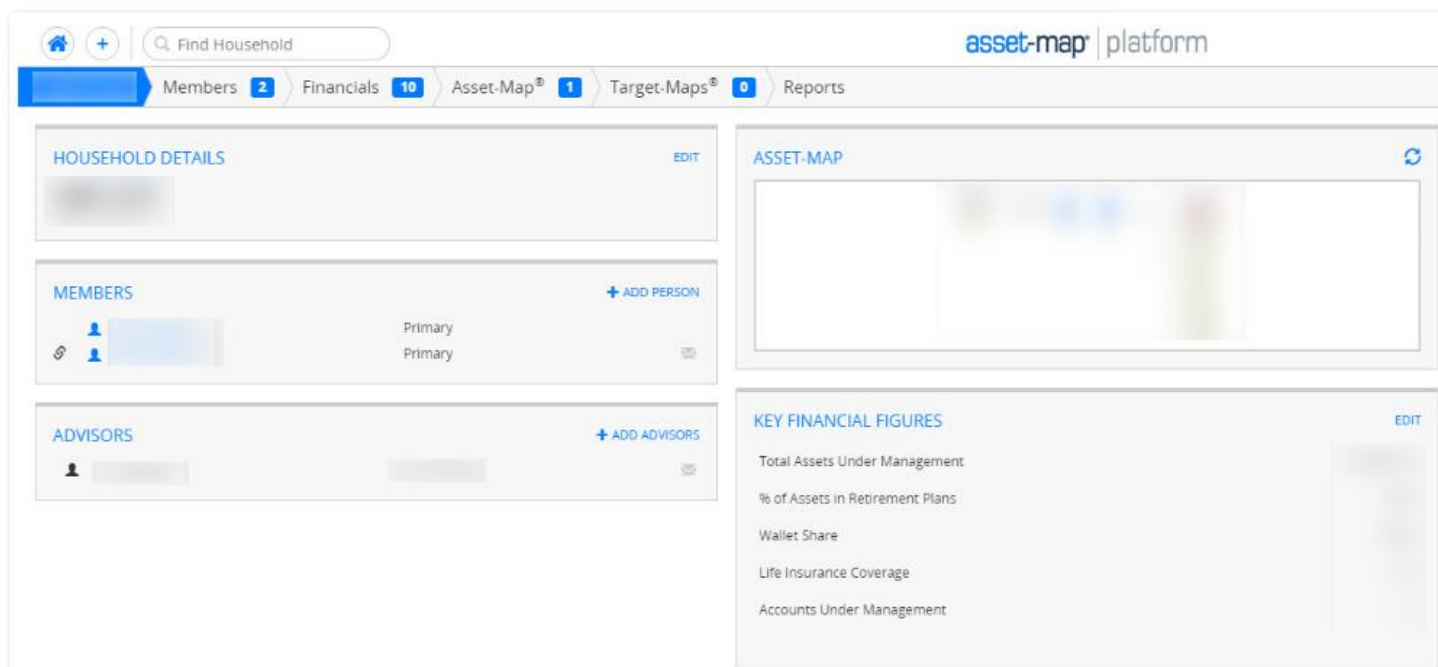
Select Options in the upper right of the screen (1), then select the Send to Asset-Map link (2). This will send the assets for this plan in MoneyGuidePro to Asset-Map and Single Sign On you to their platform.



The screenshot shows the MoneyGuidePro interface. At the top right, there is a red circle with the number '1' next to the 'Options' dropdown menu. The dropdown menu is open, showing several options: 'Options', 'Notes', 'Riskalyze', 'Request Riskalyze Authorization', 'Asset-Map', 'Request Asset-Map Authorization', and 'Send to Asset-Map'. The 'Send to Asset-Map' option is highlighted with a red circle and the number '2'.

## Step 6:

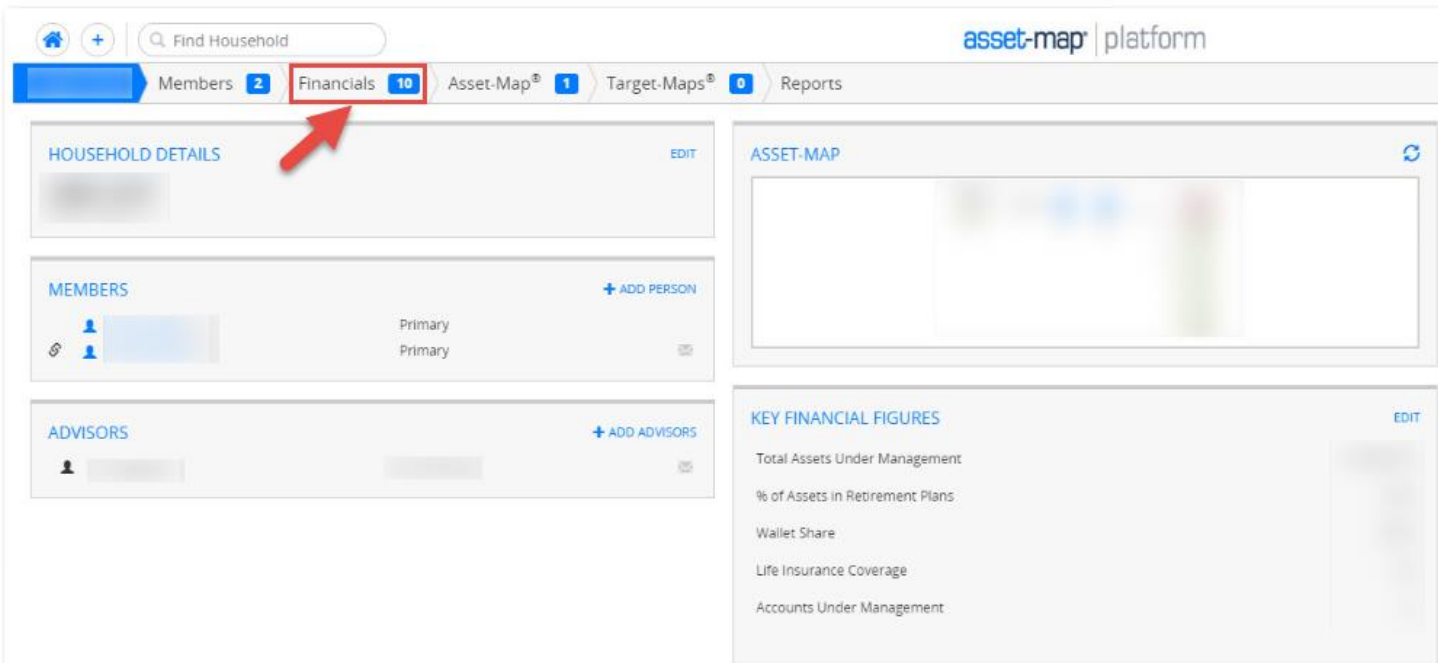
You will land on the linked client's page within Asset-Map.



The screenshot shows the Asset-Map platform interface. At the top, there is a search bar labeled 'Find Household' and the 'asset-map platform' logo. Below the search bar, there is a navigation bar with tabs: 'Members' (2), 'Financials' (10), 'Asset-Map' (1), 'Target-Maps' (0), and 'Reports'. The 'Asset-Map' tab is selected. The main content area is divided into two columns. The left column contains three sections: 'HOUSEHOLD DETAILS' with an 'EDIT' link, 'MEMBERS' with a '+ ADD PERSON' link, and 'ADVISORS' with a '+ ADD ADVISORS' link. The right column contains two sections: 'ASSET-MAP' with a refresh icon and 'KEY FINANCIAL FIGURES' with an 'EDIT' link. The 'KEY FINANCIAL FIGURES' section lists several metrics: 'Total Assets Under Management', '% of Assets in Retirement Plans', 'Wallet Share', 'Life Insurance Coverage', and 'Accounts Under Management'.

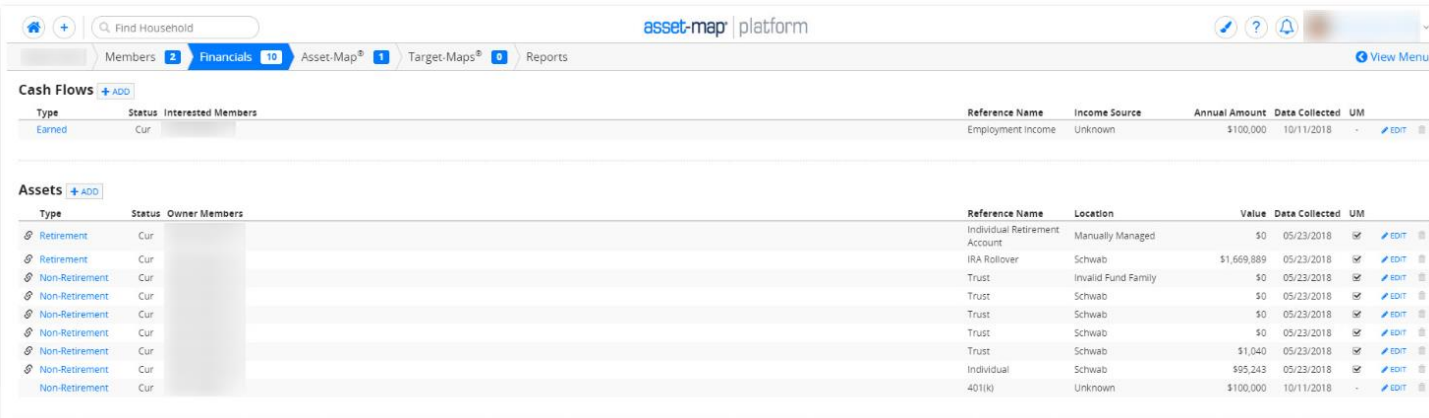
## Step 7:

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.



Type	Status	Owner Members	Reference Name	Location	Value	Data Collected	UM
Retirement	Cur		Individual Retirement Account	Manually Managed	\$0	05/23/2018	✓
Retirement	Cur		IRA Rollover	Schwab	\$1,669,889	05/23/2018	✓
Non-Retirement	Cur		Trust	Invalid Fund Family	\$0	05/23/2018	✓
Non-Retirement	Cur		Trust	Schwab	\$0	05/23/2018	✓
Non-Retirement	Cur		Trust	Schwab	\$0	05/23/2018	✓
Non-Retirement	Cur		Trust	Schwab	\$0	05/23/2018	✓
Non-Retirement	Cur		Trust	Schwab	\$1,040	05/23/2018	✓
Non-Retirement	Cur		Individual	Schwab	\$95,243	05/23/2018	✓
Non-Retirement	Cur		401(K)	Unknown	\$100,000	10/11/2018	✓

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.