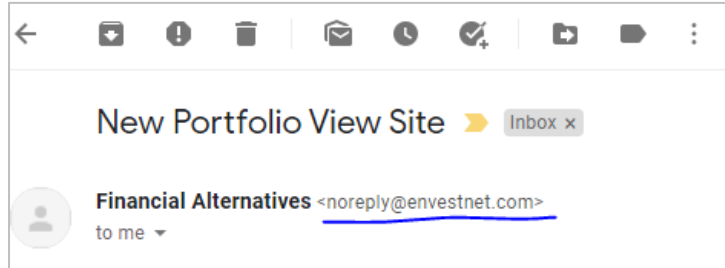


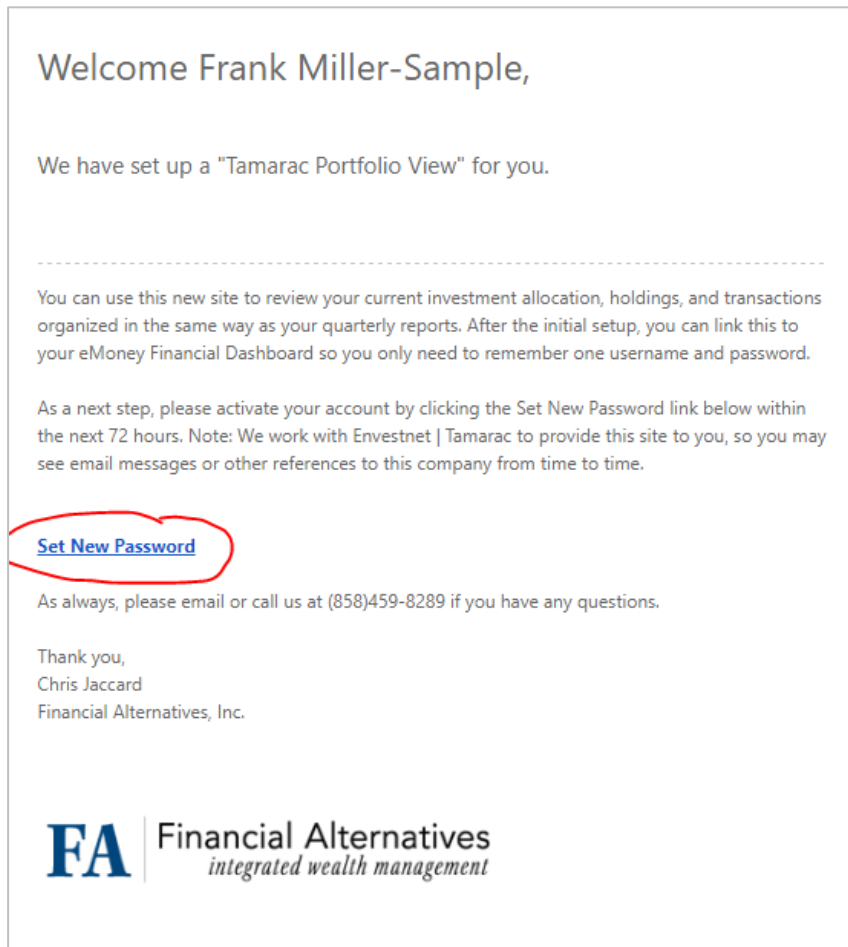
Website Registration Process

Here are the steps to get set up to view portfolio information online. Your service team will send a system generated email with a link.

1. From your email, open the invitation with the subject “**New Portfolio View Site**” (the sender will be **Financial Alternatives <noreply@envestnet.com>**)



2. Click the **Set New Password** link in the email, which will open a new page in your default internet browser.



Guide to your Tamarac Portfolio View

3. Follow the instructions to establish a password and sign in.

The image shows two overlapping screenshots of the Tamarac Inc. website. The top screenshot is the 'Set New Password' page, and the bottom screenshot is the 'Sign In' page.

Set New Password Page:

- Browser tab: Tamarac Inc. | Set New Password
- URL: financialalternatives.portal.tamaracinc.com/public/SetNewPass...
- Logo: FA | Financial Alternatives *integrated wealth management*
- Section: SET PASSWORD
- Text: Please set a new password for: [redacted]@gmail.com
- Two password input fields, each with a red underline and a visibility icon.
- Blue button: SET PASSWORD (circled in red)
- Text: Passwords must meet the following requirements:
- List of requirements:
 - Passwords must contain your full name
 - Passwords must contain characters from the following categories:
 - Upper
 - Lower

Sign In Page:

- Logo: FA | Financial Alternatives *integrated wealth management*
- Email input field: [redacted]@gmail.com (with a red underline and a dropdown arrow)
- Password input field: [redacted] (with a red underline and a dropdown arrow)
- Checkbox: Remember me on this computer
- Blue button: SIGN IN (circled in red)
- Text: Did you forget your password? [Recover it here.](#)

Link to eMoney

4. Optional Step: Add Single Sign On (SSO) with eMoney. After activation, you will receive a confirmation email with the subject “**Tamarac Portfolio View Activated**”. Follow the instructions in the Activation Email to set up the SSO connection with your eMoney Financial Dashboard.

The image shows an activation email on the left and a login form on the right. The email is addressed to Frank Miller-Sample and states that the account has been activated. It provides a direct link to the Portfolio View and instructions on how to set up a link between the Portfolio View and the eMoney Financial Dashboard. A list of steps is provided, including going to <https://wealth.emaplan.com/ema/financialalternatives>, clicking the 'W' icon in the top menu bar, signing in with Tamarac Portfolio View credentials, and clicking the link to seamlessly access the Portfolio View. The login form on the right has the Financial Alternatives logo and a 'Sign In' button circled in red. The email footer includes the Financial Alternatives logo and contact information.

Hello Frank Miller-Sample

Your account has been activated.

You can access your Portfolio View directly at <https://financialalternatives.portal.tamaracinc.com/> and use your email address and the password you created to log in.

However, we recommend you set up a link between your Tamarac Portfolio View and your eMoney Financial Dashboard so you only need to remember one username and password.

Here are the steps to do so:

- Go to <https://wealth.emaplan.com/ema/financialalternatives>
- In the top menu bar, click the icon that looks like a sideways “W” or open book (Tamarac Single Sign On)
- Sign in using your Tamarac Portfolio View credentials
- Going forward simply click the link to seamlessly access your Portfolio View.

As always, please email or call us at (858)459-8289 if you have any questions.

Thank you,
Financial Alternatives, Inc.

FA Financial Alternatives
integrated wealth management

FA Financial Alternatives
integrated wealth management

frankmillerfa

.....

Remember Me

Sign In

Forgot your password?

The image shows the Financial Alternatives dashboard. The top navigation bar includes links for Home, Organizer, Goals, Spending, Investments, Reports, and a notification bell icon circled in red. A dropdown menu for the bell icon shows 'Envestnet | Tamarac Single Sign On'. The main content area displays a welcome message for Frank and Joanna Miller-Sample. Below the welcome message, there are two main sections: 'Accounts' and 'Net Worth'. The 'Net Worth' section shows a value of \$4,313,874. The footer includes the Financial Alternatives logo and contact information.

FA Financial Alternatives
integrated wealth management

Home Organizer Goals Spending Investments Reports

Envestnet | Tamarac Single Sign On

Welcome,
Frank and Joanna Miller-Sample

Accounts

Net Worth

\$4,313,874

Financial Alternatives, Inc. | (858) 459-8289 | info@financialalternatives.com