Royal American Financial Advisors, LLC
A Registered Investment Advisor

27192 Newport Rd., Suite 4 – Menifee, CA 92584   (951) 679-2065 Office   (951) 679-2660 Fax

Client Instruction Guide: Client Screen Sharing Instructions

Step 1: Before reviewing this instruction guide, please watch this short eMoney Client Screen Sharing Overview video.

eMoney Screen Sharing demo (1:09)
**Video link (click here):** http://www.viddler.com/v/3cbcd22e

This training guide will demonstrate remote Screen Sharing with your advisor. As a client of Royal American Financial Advisors, LLC, you now have the ability to request a screen sharing session with your advisor. Both you and your advisor can collaborate with financial planning, or maybe even help with setting up your personal financial website. We are here to help.

1. At the bottom right hand side of the **Home** page, click the **Join Screen Sharing Session** and a window will pop up asking for your session code. This is a random code generated for each session and will be provided to you by your advisor in advance of the session.

2.

2. Enter the code you received from your advisor (with spaces included), and click **GO**. It's that simple!
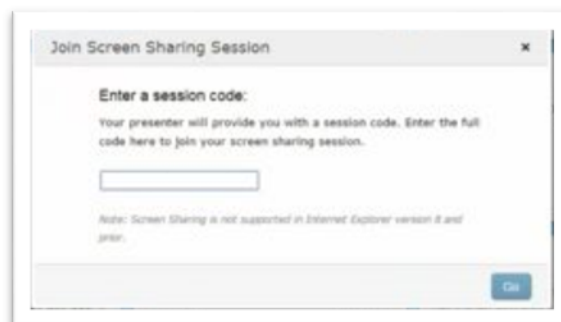
Your advisor will now be in control of the session.

Your advisor also has the ability to allow you to control the screen on your personal financial website, so you can demonstrate any issues you need help with. If you, as the client, are in control of the session, please note, to make changes to your site, click on the **HOME** tab. The **FIREFLY** tab should be thought of as view only.

Please Note:
- Only the active eMoney webpages are exposed. Only the eMoney website can be viewed. Nothing else on your computer can be viewed or accessed.
- Screen Sharing is supported for IE 9 and above.

You are still in control over your privacy settings. Your advisor will not be able to see your budget or bank/credit card transactions (unless you change the settings). Your advisor cannot change these settings even when screen sharing.

For help with budgets and transactions, you must temporarily turn on **FULL PERMISSIONS** for your advisor. After the session, you can set the permissions back to **NONE**.

If you do not need help with budgets, transactions, or spending, there is no need to change privacy settings and you can leave the permissions on **NONE**.
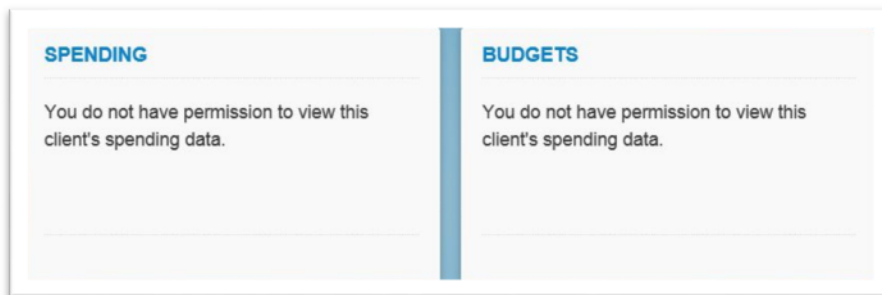
1. The **Privacy** tab allows control of the advisor's access to budgets and spending. The budget and transactions sharing is optional, and the privacy setting is controlled by you. The default is set to NONE for complete privacy for your eyes only.

   The budget and/or transactions feature on your personal website, by default, is hidden from view from us, your advisor, for your privacy. We are still available for help, or to answer general questions. Or, you may choose to temporarily turn off the privacy, so we can help you with specific questions. We even have the ability to do a safe and secure screen sharing session with you, if necessary (by appointment).
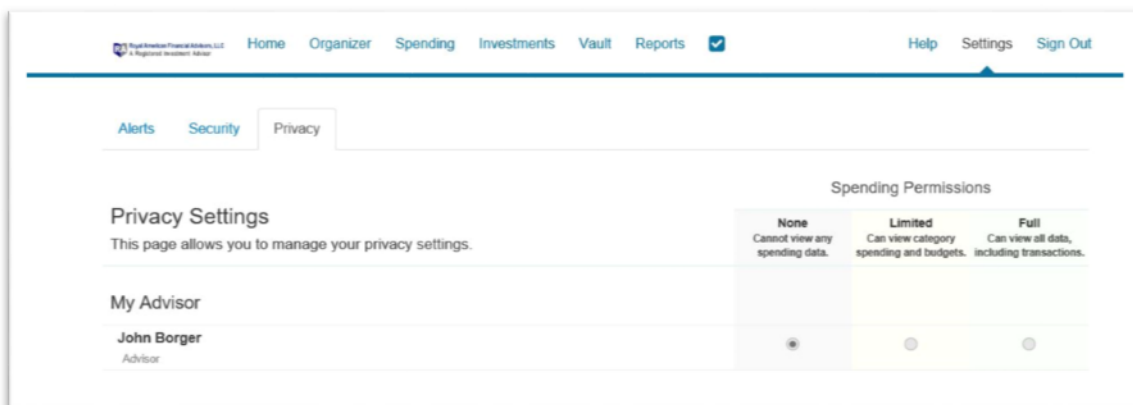

If you desire, you may change your privacy settings temporarily, to allow us to see limited information (such as budget categories only), or full access (showing all budget categories and all transactions). This will allow us, as your advisors (and only us), to assist you with any specific questions you may have. Once your questions are answered, you can turn your privacy back on.

This is what we, as your advisors, will see when you have your privacy turned on (by default):

SPENDING	BUDGETS
You do not have permission to view this client's spending data.	You do not have permission to view this client's spending data.

This is what we will see when you have your privacy turned off so we can help you with specifics: You can choose limited, or full access, depending upon the question you may have.
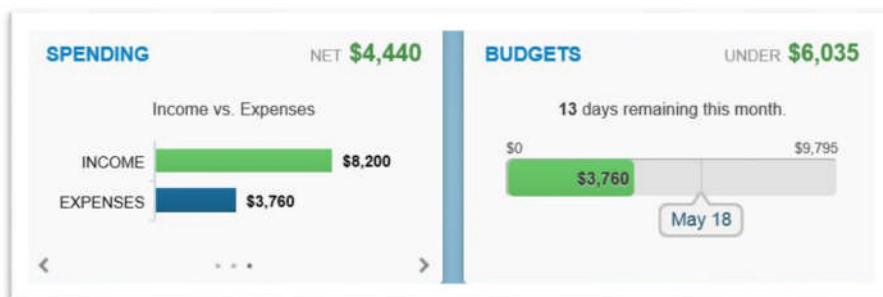
To turn privacy settings on/off: Click on Settings in top right corner of your screen.
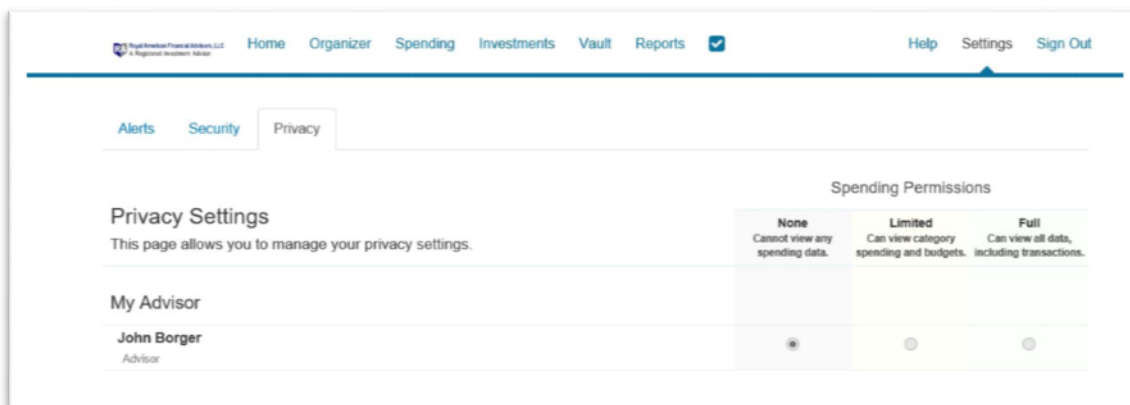
There are three varieties of Spending Permissions:
- **None -** The user does not have access to any of your spending data (default is NONE).
- **Limited -** The user has limited access to your spending details and can only view the categories regarding the spending and budgets.
- **Full access -** The user can view all spending and budgeting data, including transactions.