

Download the Mobile App

This user guide will demonstrate how to download the mobile app and sign in. The mobile app is a great way to keep your Client Portal in hand at all times. Mobile features like push notifications and biometric credential verification (fingerprint or face ID) can make it even easier to access and stay on top of alerts and notifications happening in your Client Portal.

Click the link for your device on the footer of your portal, or go directly to the app store specific to your mobile Device, search eMoney Client Portal, and download the app.

Take your Client Portal with you wherever you go.

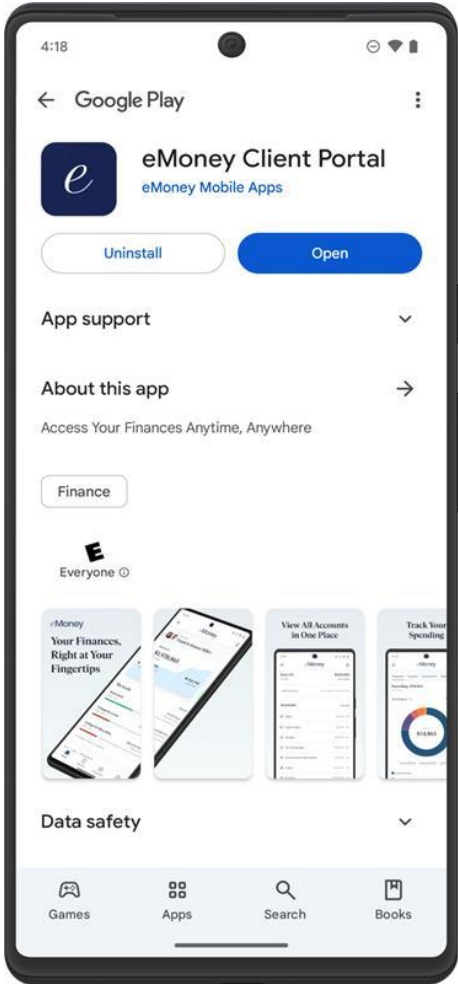
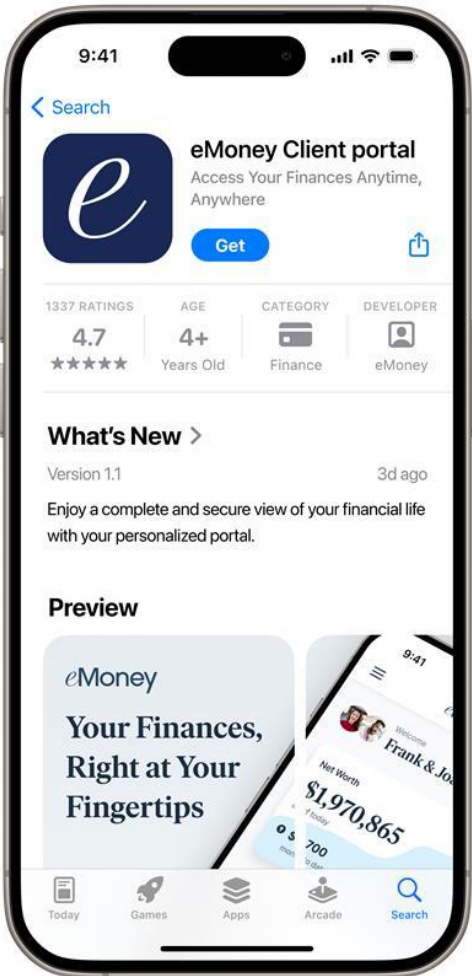




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Two Options to Sign In:

1. If you use a username and password to log in on the desktop, enter your username here and click Next. You will then be asked for your password and any additional verification you have set up. You will then be signed in and ready to use the app!
2. If you Single Sign On (SSO) to your Client Portal, then click **Continue with SSO**.

Cancel auth.wealth.emaplan.com

eMoney

Username

JohnSmith

1 Next

OR

2 Continue with SSO

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3. You will then be asked to enter your SSO Identifier. The next step will show you where to find that identifier.

eMoney

Your SSO Identifier

ex: 0oa7da4gqwZMDcEtT1d7

Next

What is an SSO Identifier?

An SSO Identifier is a code that identifies the financial institution which you will use to verify your login credentials. The SSO Identifier can be found in your financial website **Settings** under the **Security > Single Sign On** section

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4. Sign in to your Client Portal on your desktop and click **Settings**. At the bottom of the Settings page, you will see the Single Sign-On section. You can either manually type the Identifier from this page into your mobile app, or click **Email** here, open your email on your phone, and copy it into the mobile app from there.

You will then be signed in and are ready to use the app!

eMoney

Home Organizer Goals Spending Investments Vault Reports

Alerts Security Privacy Approvals

Settings Sign Out

Change Password

This screen allows you to create or change a password that you can use to access eMoney from other tools and software.
This password will work with the following product:

- eMoney Mobile - accessed through a mobile web browser at the following url:
<https://wealth.emaplan.com/ema/>

Important notes:

- This will NOT change your broker dealer password.
- This password will only work with the product listed above.

User Name: SPIPREFIX:client32025

New Password:

Verify Password:

Save

Single Sign On

When logging in using Service Provider Initiated SSO, you will need to provide the Single Sign On Identifier of the financial institution that will authenticate your credentials.

The SSO Identifier for your financial institution is

0oaf7z8l2mk4amdGF4h7 [Copy](#) [Email](#)

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