



ENVESTNET MoneyGuide



Tolerisk

Tolerisk

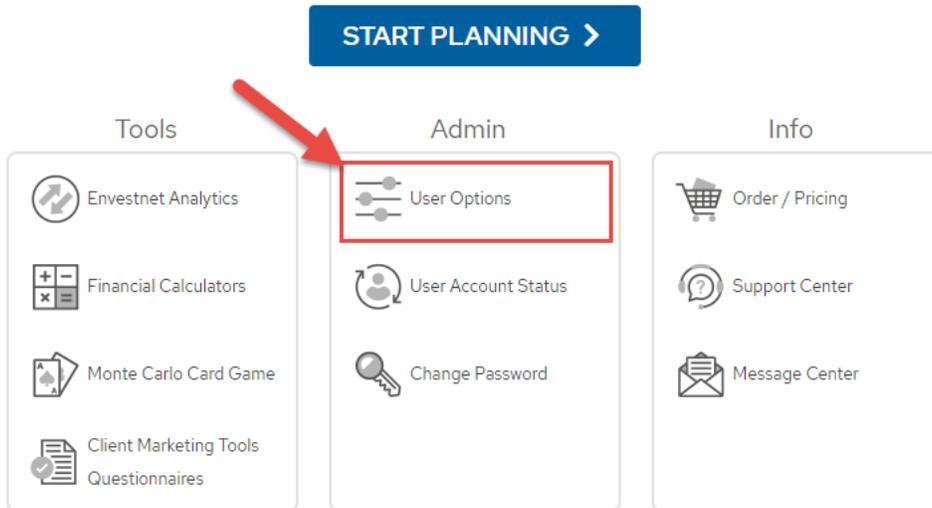
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Setting up the link between MoneyGuide and Tolerisk:

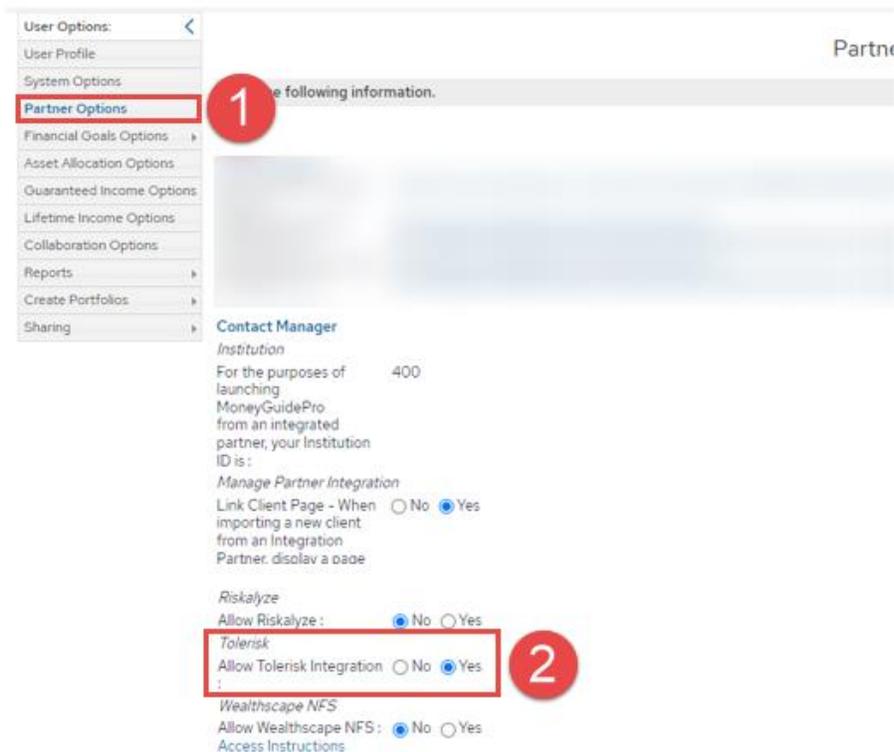
Step 1:

Login to MoneyGuide and select User Options.



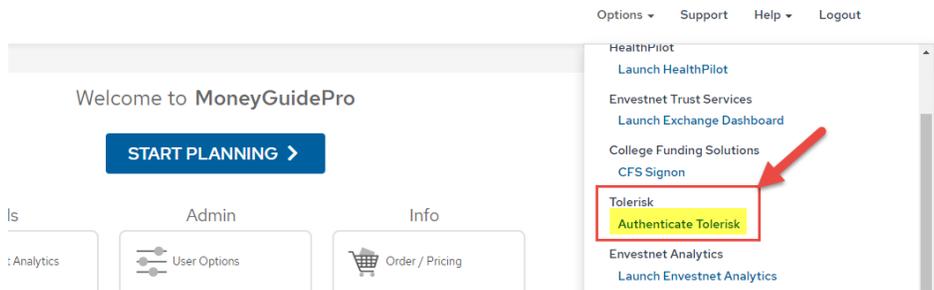
Step 2:

Select Partner Options (1) > Locate Tolerisk and set the radio button to Yes (2). Then select Main Menu (3).



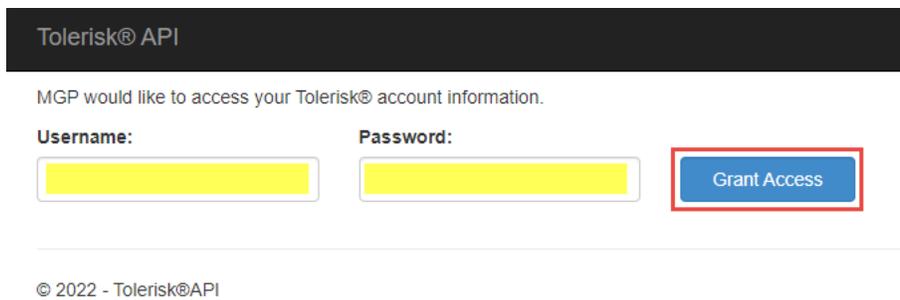
Step 3:

From the Main Menu select Options, then select Authenticate Tolerisk.



Step 4:

Enter your Tolerisk credentials then select Grant Access.

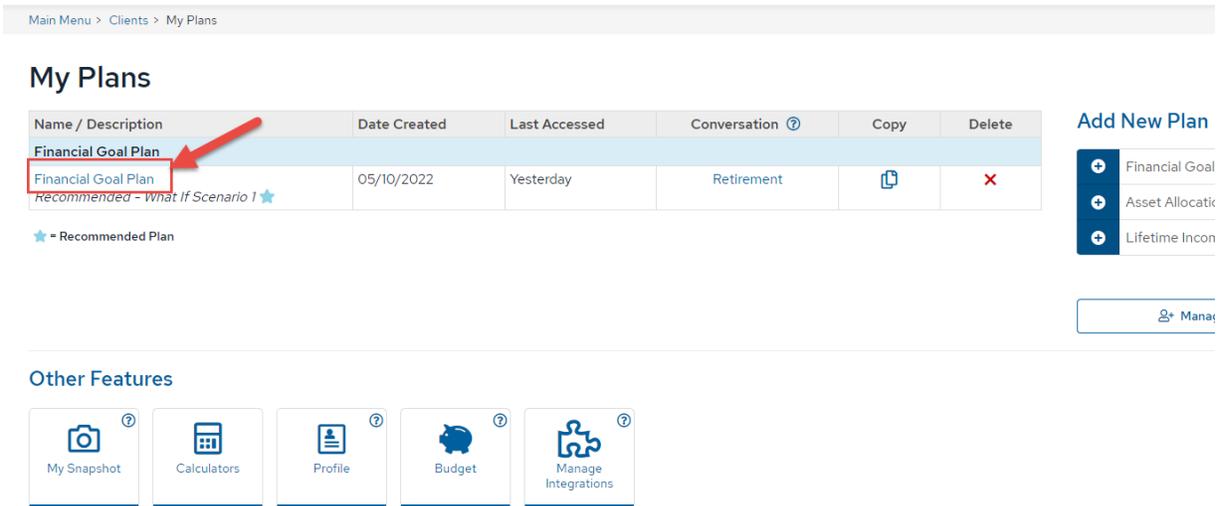


You have completed the setup to link Tolerisk and MoneyGuide. You can go to the next section for directions on how to send data to Tolerisk.

Sending client data to Tolerisk

Step 1:

From a client's My Plans page select a Financial Goal Plan



Main Menu > Clients > My Plans

My Plans

Name / Description	Date Created	Last Accessed	Conversation ?	Copy	Delete
Financial Goal Plan					
Financial Goal Plan <i>Recommended - What If Scenario 1</i> ★	05/10/2022	Yesterday	Retirement		

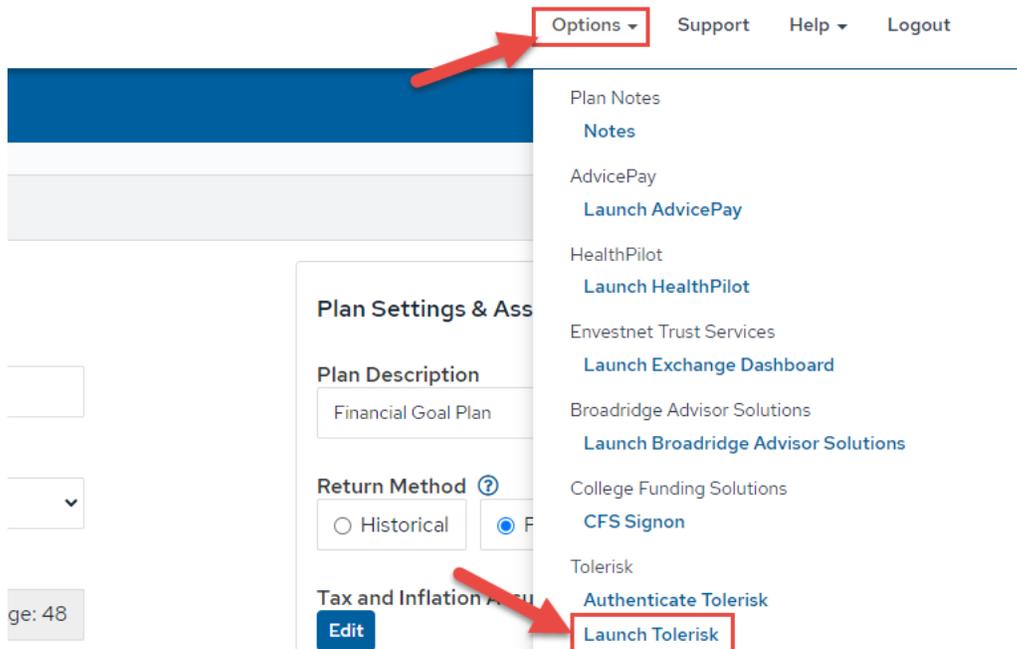
★ = Recommended Plan

Other Features

- My Snapshot
- Calculators
- Profile
- Budget
- Manage Integrations

Step 2:

Select Options in the upper right of the screen, then select Launch Tolerisk.



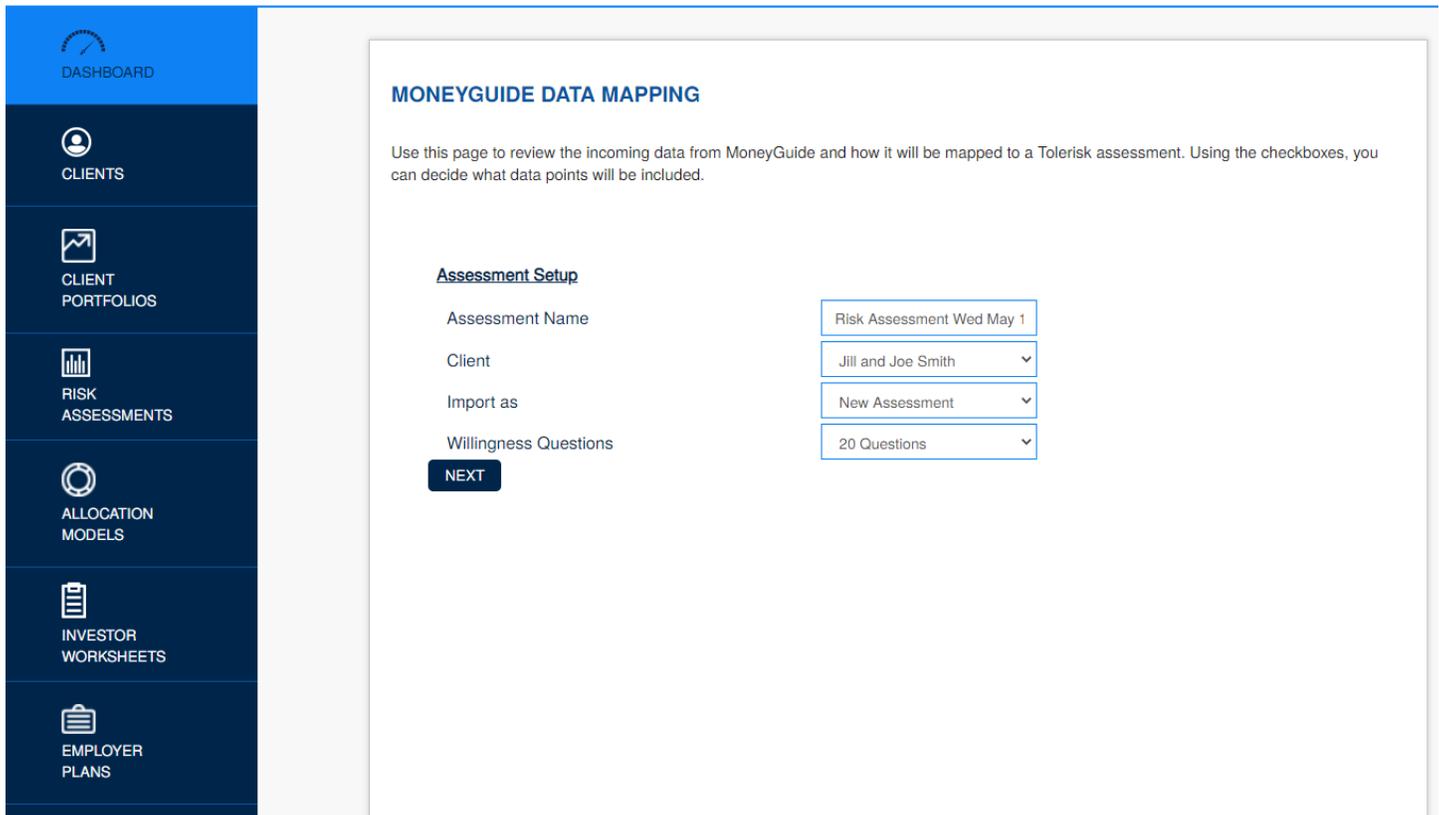
Options ▾ Support Help ▾ Logout

- Plan Notes
- Notes
- AdvicePay
 - Launch AdvicePay
- HealthPilot
 - Launch HealthPilot
- Investnet Trust Services
 - Launch Exchange Dashboard
- Broadridge Advisor Solutions
 - Launch Broadridge Advisor Solutions
- College Funding Solutions
 - CFS Signon
- Tolerisk
 - Authenticate Tolerisk
 - Launch Tolerisk

Step 3:

Investment assets, Financial Goals, Retirement Income(s) and client personal information will be sent to Tolerisk, and you will be launched into their platform in a separate window.

Advisors Inc.



MONEYGUIDE DATA MAPPING

Use this page to review the incoming data from MoneyGuide and how it will be mapped to a Tolerisk assessment. Using the checkboxes, you can decide what data points will be included.

Assessment Setup

Assessment Name: Risk Assessment Wed May 1

Client: Jill and Joe Smith

Import as: New Assessment

Willingness Questions: 20 Questions

NEXT

Repeat this process for any client you wish to link with Tolerisk.

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