ENVESTNET
MoneyGuide

Tolerisk

Tolerisk

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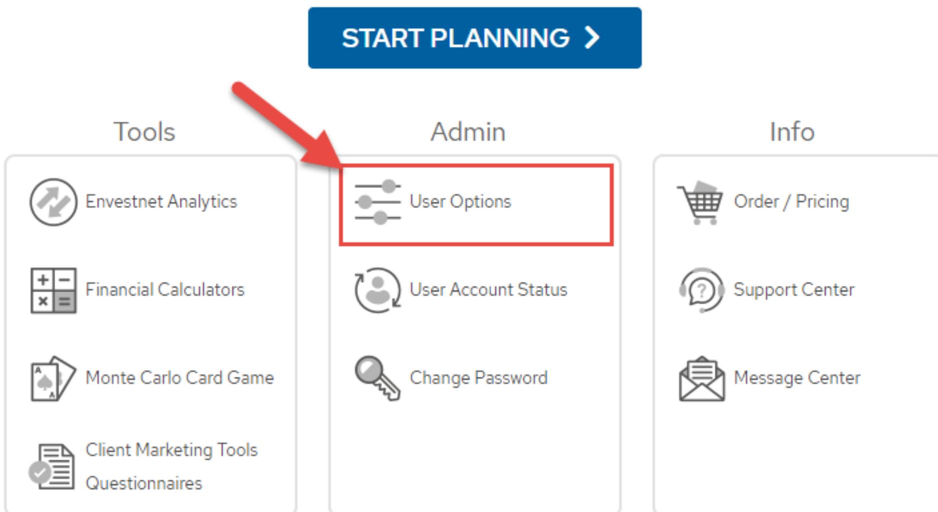
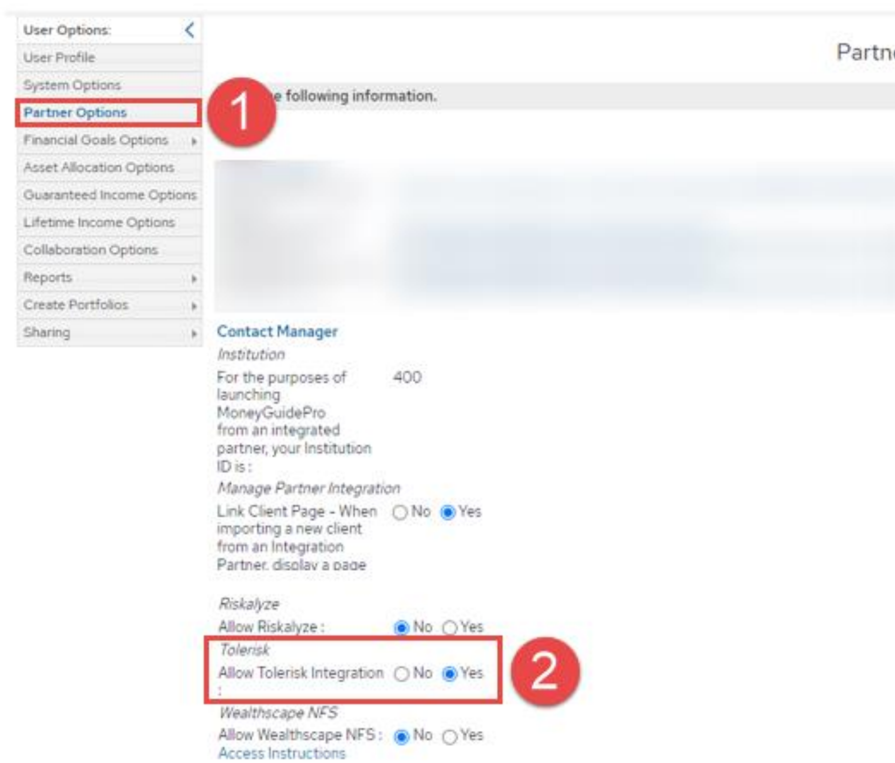
Setting up the link between MoneyGuide and Tolerisk:

Step 1:
Login to MoneyGuide and select User Options.

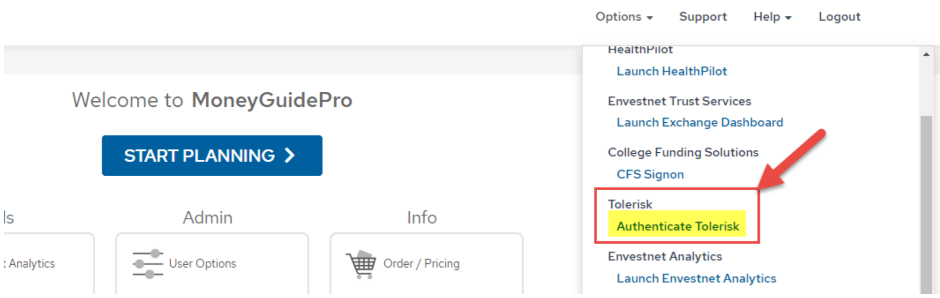


Step 2:
Select Partner Options (1) > Locate Tolerisk and set the radio button to Yes (2). Then select Main Menu (3).



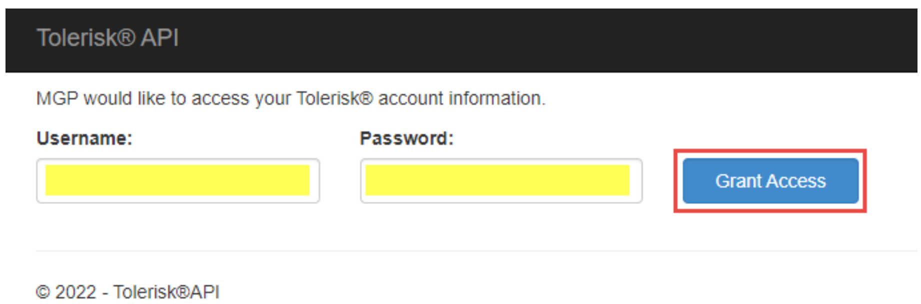
Step 3:

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



Step 4:

Enter your Tolerisk credentials then select Grant Access.

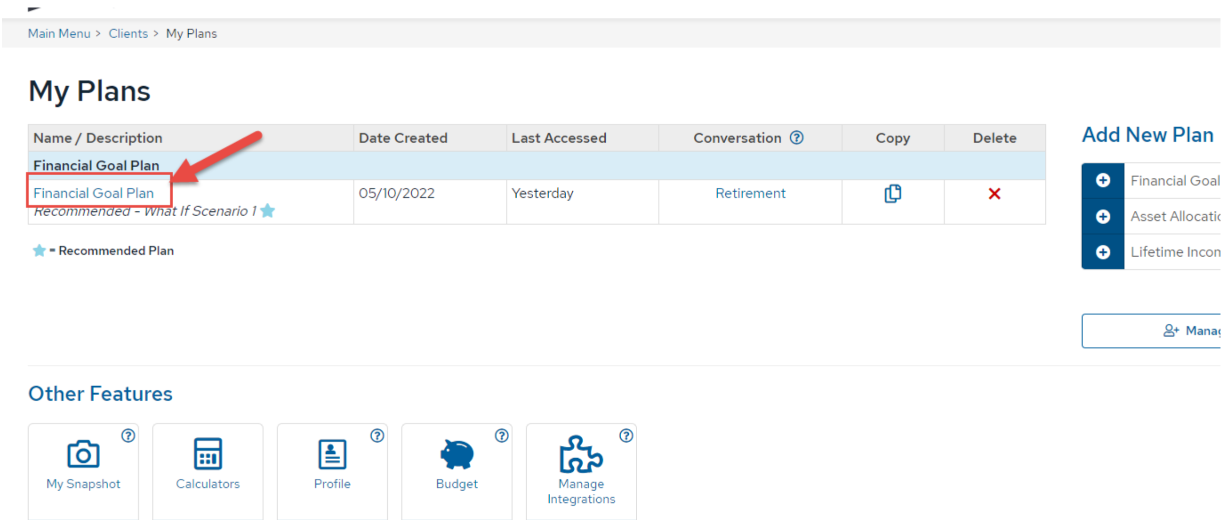


You have completed the setup to link Tolerisk and MoneyGuide. You can go to the next section for directions on how to send data to Tolerisk.

Sending client data to Tolerisk

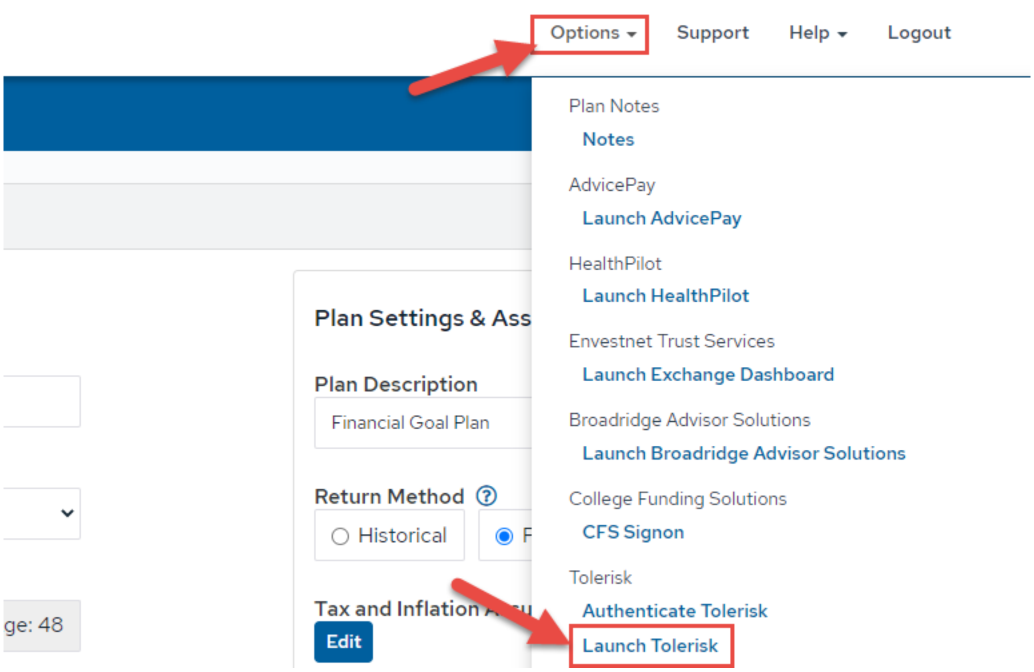
Step 1:

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



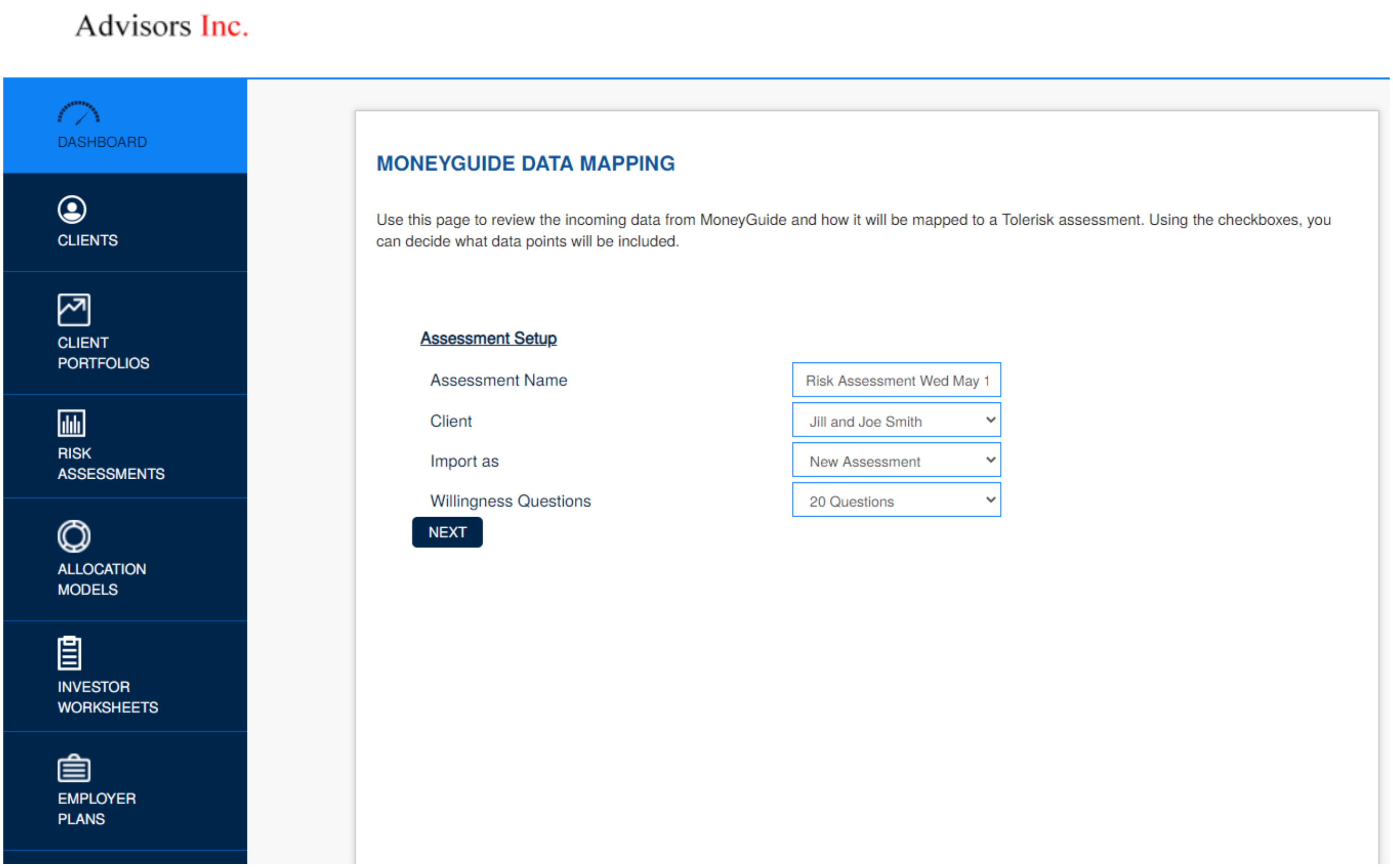
Step 2:

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



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