



Wealth Management Tour Guide Access

The Wealth Management system does a good job at providing overviews for clients on how to navigate and learn about the system. Here's how to access it.

From our website, www.rfgweb.com, select Client Access from the Splash page. From here, select Wealth Management to be taken to the login page as shown below.

To logon, enter your User Name and Password and click the Logon button.

User Name:

Password:

Enable Additional Security:

Logon

Forgot My Password  Unable to Logon 

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eMoney Advisor

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FAVORITE REPORTS
 Balance Sheet
 Assets
 Cash Flow
 Asset Allocation
 Life Insurance Summary
 Family Information Summary
 Asset Summary
 Liabilities and Expenses Summary
 Income, Transfers and Savings
 Assumptions Summary
 List of Advisors
 Vault Contents
 Estate Flow Chart
 Entity Flow Chart
 Income Tax
 Life Insurance Analysis
 Objectives
 Statement of Assets and Liabilities

Financial Snapshot

Assets ¹	
Taxable Investments	\$1,030,375
Retirement Investments	\$1,273,085
Cash and Equivalents	\$53,508
Real Estate	\$1,000,000
Life Insurance	\$25,000
Annuities	\$315,300
Personal Property	\$150,000
Total	\$3,847,268

Liabilities	
Mortgages	(\$320,000)
Total	(\$320,000)

Total Net Worth **\$3,527,268**

Assets Outside Estate **\$86,978**

Total²: \$3,614,246

Income / Expense Summary

Income Sources	
Salaries / Bonuses	\$135,000
Total	\$135,000

Expenses	
Living Expenses	\$142,000
Estimated Taxes	\$47,013
Other Expenses	\$36,468
Total	\$225,481

Net Income: (\$90,481)

Investments

Plan Assets	Estimated Value ³
401(k) - Barclays 10/15/2010 4:00P	\$449,032
529 Plan - Jessica 10/15/2010 4:00P	\$38,158
529 Plan - Jimmy 10/15/2010 4:00P	\$48,820
Checking 10/15/2010 4:00P	\$53,508
E*Trade Stock 10/15/2010 4:00P	\$46,720
Fidelity Stock 10/15/2010 4:00P	\$508,560
Fidelity Taxable Brokerage 10/17/2010 4:00P	\$475,095
IRA - Charles Schwab 10/17/2010 4:00P	\$599,985
Life Insurance AIG UL 2/28/2007 12:44P	\$25,000
Roth IRA - Charles Schwab 10/17/2010 4:00P	\$224,068
Stock Option Plan - Phillip Morris	

Hees and Shees Affluent

Change Password | Help | Tour Guide | Log out

Setup Alerts

TOUR GUIDE
LEARN ABOUT THE SYSTEM

After logging in with your Username and Password, you'll be shown your Dashboard. The "Tour Guide" is located in the upper right of this page as to the right.

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Selecting it will bring up a new window where you can choose any Topic you'd like to review and learn via a video how that part works.



Please let us know if you would like some additional help when navigating the Wealth Management page. Also please note that the Wealth Management page is available to those with a subscription.

For more information on how to add the Wealth Management subscription, please give our office a call at (847) 670-8000.