



FIRST REPUBLIC BANK

eMoney.com Instructions

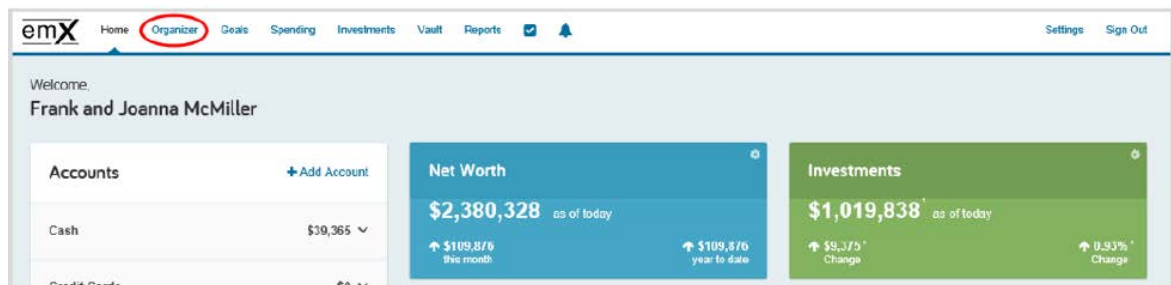
Below you will find instructions to connect your First Republic account(s) to eMoney.com. Please note that as First Republic Bank completes upgrades to the New Digital Banking Experience, eMoney aggregation services may be temporarily interrupted.

NOTE: If you have not yet logged into Online Banking at www.firstrepublic.com/bankingonline and accepted the Terms and Conditions, please complete that step first before accessing eMoney. [Click here to find detailed instructions for signing in from your desktop.](#)

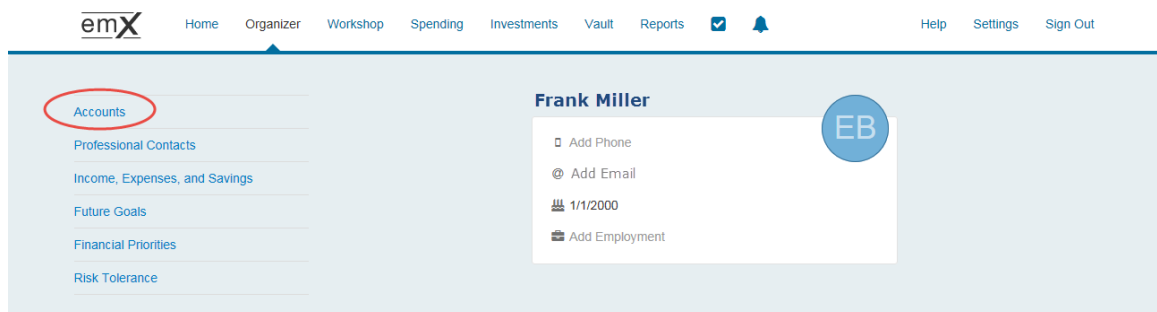
Updating Credentials in eMoney

To connect eMoney to your First Republic accounts, please follow these steps:

1. Sign in at wealth.emaplan.com/ema/SignIn. Select **Organizer** from the top menu.



2. Click **Accounts**.





3. Click the **Click to fix** link inside the red **Warnings** alert bar.

The screenshot shows the emX Accounts page. At the top, there is a navigation bar with links for Home, Organizer, Workshop, Spending, Investments, Vault, Reports, and Help. Below the navigation bar, there is a section for "Accounts" with a "Go back to Organizer" link and an "Add" button. A card for "First Republic Bank - Digital Banking" is displayed, with icons for delete, settings, and refresh. A red warning bar at the bottom of the card reads: "The institution rejected your credentials. Click to fix".

NOTE: If you have multiple accounts with warnings, you may need to click **First Republic** to continue.

The screenshot shows a "Warnings" table with the following columns: Name, Owner, Status, and Last Updated. The table contains several rows of warnings. A yellow callout box with the number "1" points to a specific warning row. The warning row has the following data: Name: First Republic Bank - Digital Banking, Owner: [Redacted], Status: Credentials rejected, Last Updated: 5 minutes ago. The "Credentials rejected" status is highlighted with a green box.

Name	Owner	Status	Last Updated
[Redacted]	[Redacted]	Connection Error	Never
Capital One Capital One	[Redacted]	Connection Error	Yesterday
First Republic Bank - Digital Banking	[Redacted]	Credentials rejected	5 minutes ago
Harold Bank Harold Bank	[Redacted]	General Error	Feb 09, 2018

4. Enter your updated credentials and click **Connect** (please make sure that you have accepted the Terms and Conditions on www.firstrepublic.com/bankingonline prior to this step).

The screenshot shows the emX Accounts page with a red warning bar that reads: "The institution rejected your credentials. Click to close". Below the warning bar, there is a form with the following text: "Please verify that you can log into First Republic Bank - Digital Banking, then enter your credentials in the form below." The form contains two input fields: "User Name" and "Password". Below the input fields is a "Connect" button.



Adding First Republic to eMoney (New Users)

1. Sign in at wealth.emaplan.com/ema/SignIn (please make sure that you have accepted the Terms and Conditions on www.firstrepublic.com/bankingonline prior to this step).

The screenshot shows the emX dashboard. The top navigation bar includes Home, Organizer (circled in red), Goals, Spending, Investments, Vault, Reports, and a notification bell. Below the navigation bar, it says "Welcome, Frank and Joanna McMiller". There are three main sections: "Accounts" with a "+Add Account" button and a list showing "Cash" at \$19,365; "Net Worth" at \$2,380,328 with a monthly increase of \$109,876; and "Investments" at \$1,019,838 with a monthly increase of \$9,375.

2. From your home page, click **Organizer** then click **Accounts**. You can also click **+Add Account** from the home page.

The screenshot shows the emX Organizer page. The top navigation bar includes Home, Organizer (selected), Workshop, Spending, Investments, Vault, Reports, and a notification bell. On the left, a sidebar menu has "Accounts" circled in red, along with "Professional Contacts", "Income, Expenses, and Savings", "Future Goals", "Financial Priorities", and "Risk Tolerance". On the right, there is a profile card for "Frank Miller" with a blue "EB" icon and options to "Add Phone", "Add Email", "1/1/2000", and "Add Employment".

3. Select whether or not you have an online login for this account. If you do not have an online login for this account, the application will guide you to add the accounts manually.

The screenshot shows a dialog box titled "Add Accounts" with a "Go back to Accounts" link. The main text asks "Do you have an online login to your account's institution?". There are two buttons: "I have an online login to this account" and "I don't have an online login to this account". A "Cancel" button is located at the bottom center.



4. Search for **First Republic Bank – Digital Banking**.

emX Home Organizer Workshop Spending Investments Vault Reports Help Settings Sign Out

Go back to Accounts
Add Accounts

Enter your institution's name or website address

First Republic Bank - Digital Banking Search

Search results (1 matches found)

1. First Republic Bank - Digital Banking

5. Enter your credentials and click **Continue**.

emX Home Organizer Workshop Spending Investments Vault Reports Help Settings Sign Out

Go back to Accounts
Add Accounts

First Republic Bank - Digital Banking
www.firstrepublic.com

To connect to your accounts, enter your credentials below.

User Name
username

Password
.....

Connect

Previous Step Cancel

Once successfully linked, First Republic – Digital Banking accounts will show 90 days of transaction history and build over time.

Contacting Your Wealth Manager or Financial Planner

1. Find the contact information for your Wealth Manager or Financial Planner in the footer of your eMoney page.

For additional footnotes, definitions, and explanations about your accounts and investments, click here.

Justin Jones
jjones@emoneyadvisor.com
Contact Justin

Site Map
Home
Organizer
Workshop
Spending

Investments
Vault
Reports

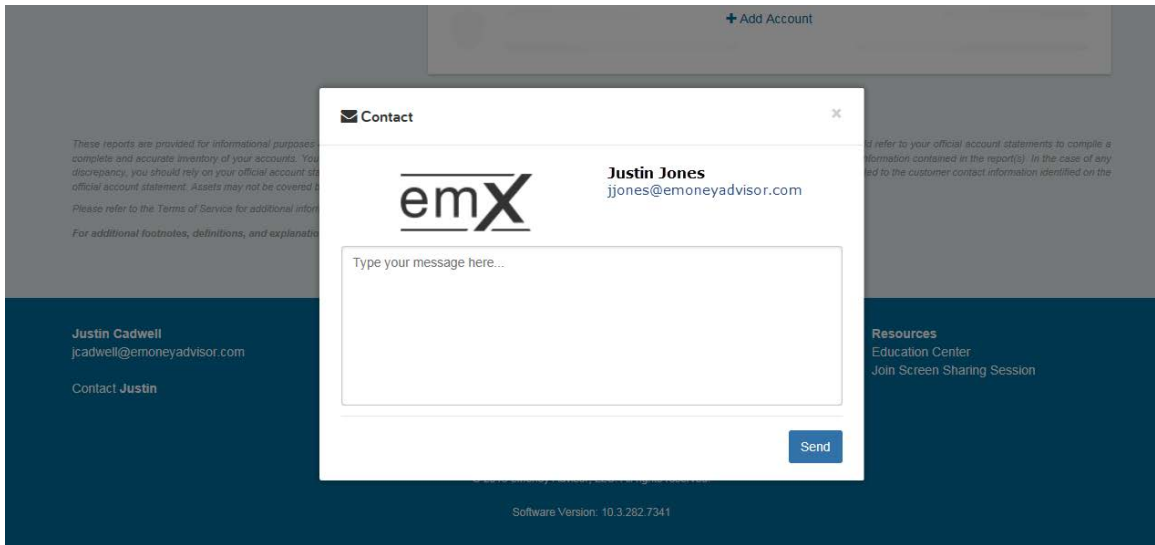
Resources
Education Center
Join Screen Sharing Session

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FIRST REPUBLIC BANK

2. Click **Contact** to send a message to your Wealth Manager or Financial Planner directly.



Duplicate Accounts or Transactions

If you have two connections to First Republic Bank and are seeing duplicate accounts or transactions, please contact your Wealth Manager or Financial Planner and a request will be made to link your accounts to remove duplicates.

Missing Account History

If more than 90 days have passed since you last signed in to eMoney, you may be missing some of your account history. If you would like to view your missing account history, please contact your Wealth Manager or Financial Planner and a request will be made to upload previous history.

Thank you for making these important changes.

Please contact Online Banking Support at (855) 886-4819 if you need further assistance.