Setting Up Single Sign-On Access for Your Online Portals

As an Evergreen Gavekal client, you have ***two*** client portals for reviewing your financial plan:

1. **Tamarac investment portal**:
    a. granular details on your Evergreen investment portfolio: current values, historical performance, contributions and withdrawals.
2. **eMoney financial planning portal**:
    a. the rest of your financial life: outside investments, other assets and liabilities, cash flow, and retirement plans (plus a high-level view of your Evergreen accounts).

Note: *if you haven't set up your Evergreen financial plan yet, contact your Wealth Consultant to get started.*

You can set up **single sign-on** (SSO) so the two portals link to each other with one click.

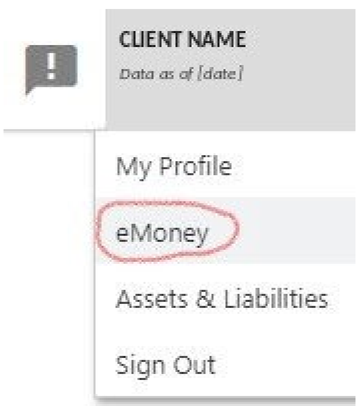
Follow whichever checklist below matches the portal you want to start with. You will need your login information for both services to set this up.

TAMARAC INVESTMENT PORTAL

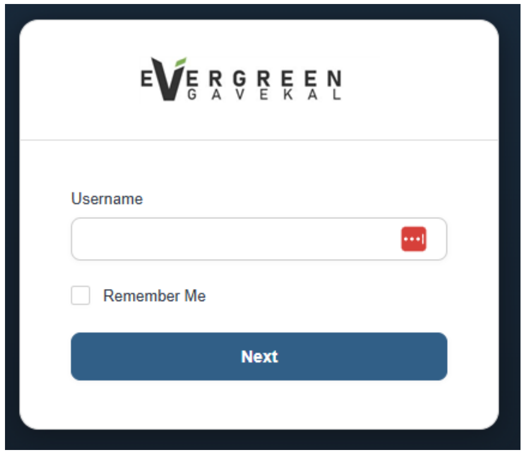
☐ Log into your Evergreen Gavekal client portal.

☐ Hover over your name in the top-right corner of the toolbar.

☐ Click "eMoney" from the dropdown menu.



☐ Enter your eMoney login credentials when prompted.

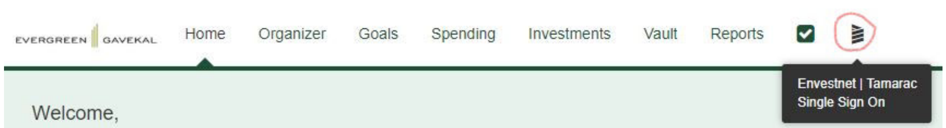


Done — this link now takes you directly to your eMoney portal going forward.

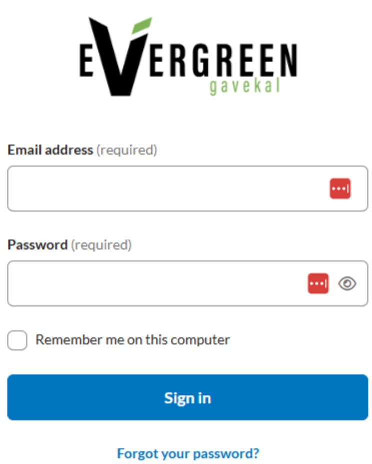
EMONEY FINANCIAL PLANNING PORTAL

☐ Log into your [eMoney financial planning portal](#).

☐ Click the "Envestnet | Tamarac" logo in the middle of the toolbar (highlighted below).



☐ Enter your Evergreen Gavekal client portal credentials when prompted.



Done — this link now takes you directly to your Evergreen Gavekal portal going forward.

As always, don't hesitate to contact your Wealth Consultant if you need any troubleshooting help.