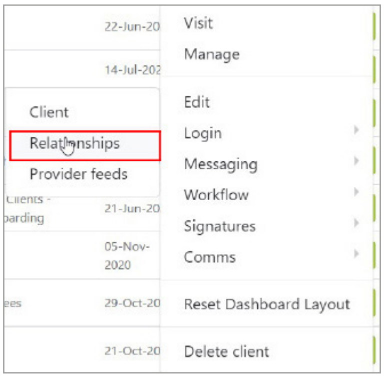
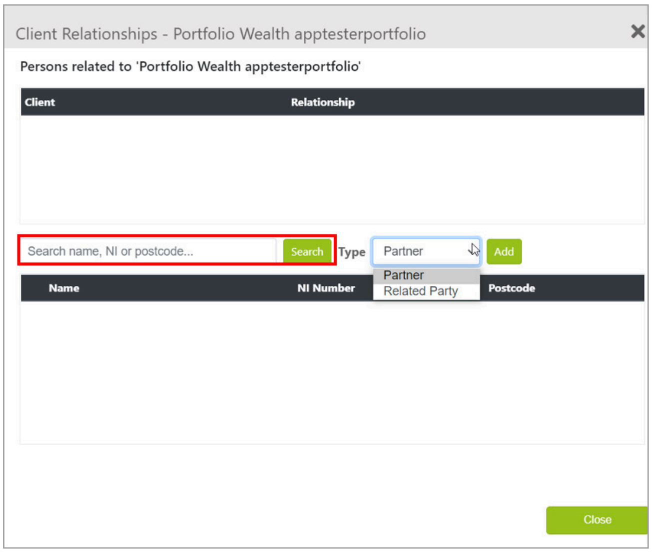
How to Guide

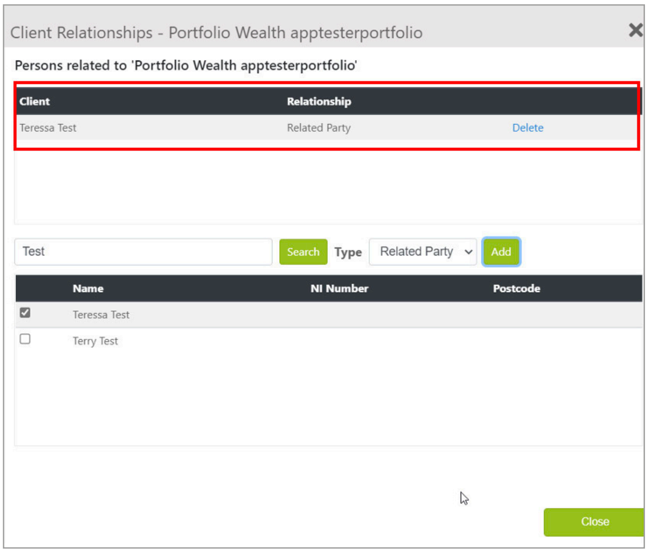
How to link other parties via Relationships

On moneyinfo Manager, find the client you wish to add a relationship for, then navigate to:
Actions > Edit > Relationships

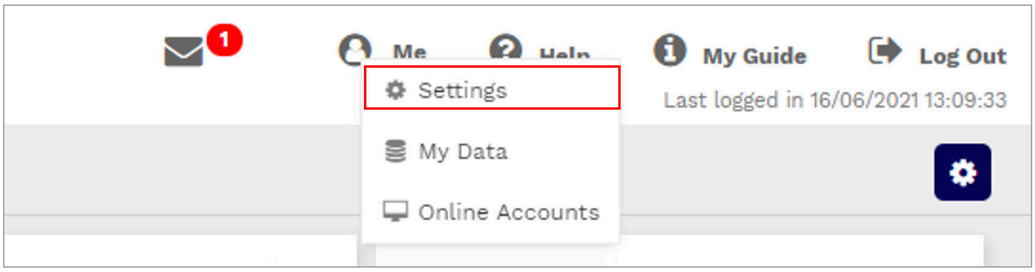


Search for the person to be linked to the client (this could be a 3rd Party/Spouse/Child/Power of Attorney).
Select Type > Add > Close





Under the same client go to > Actions > Manage
Once in the client view go to Me > Settings



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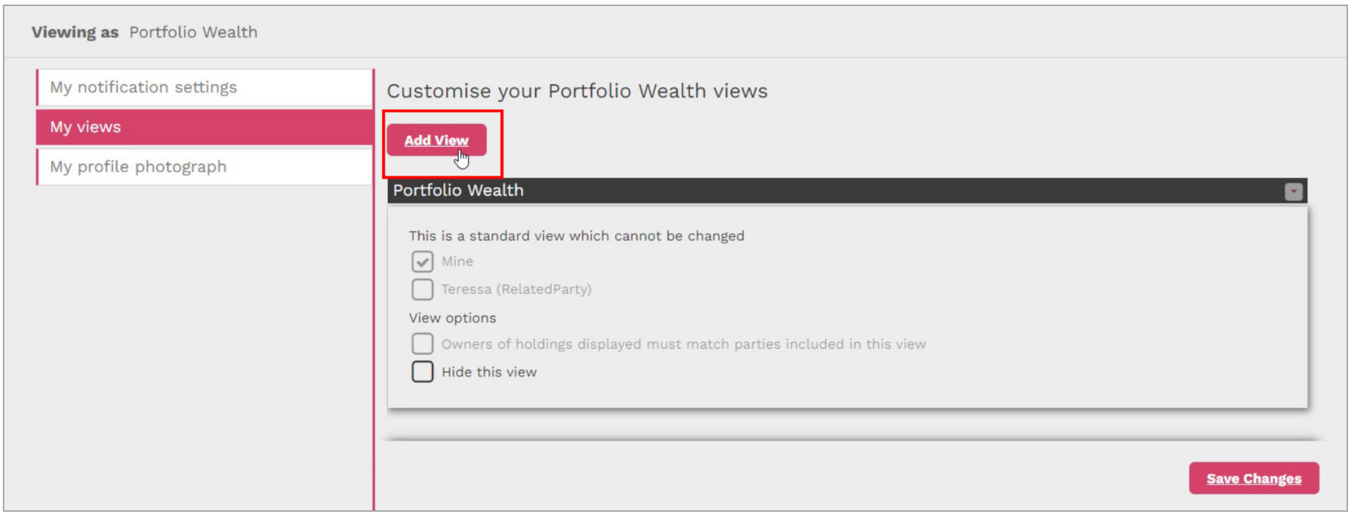
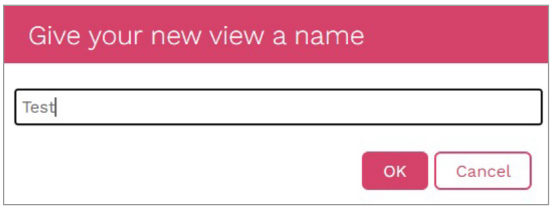
Go to My Views > Add View



Name the View i.e., the name of the person being added to the view list.



Select this person > Save Changes

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Go back to Home/Dashboard.
This view can now be chosen on the dropdown list under 'Viewing As'