



Integration with Investnet | MoneyGuide



For wealth management firms using MoneyGuide, there is now a seamless integration with Max, the industry-leading cash management solution.

Integration Benefits

Clients appreciate Max's industry-leading cash management solution, allowing them to access preferred rates on held-away cash, obtain broader FDIC coverage, and benefit from other features such as consolidated tax reporting. *Advisors* appreciate how Max helps them gain visibility into held-away assets, to support broader goals-based planning and AUM growth.

Advisors and client service teams can now bring a client's Max balances into MoneyGuide easily, without any action required by the client.

The integration enables planners to see a client's Max balances in their financial plans so that they can take account of the client's cash position when discussing goals and asset allocation. Clients can also see their Max balances when they view their financial plans.

How It Works

To enable the integration in MoneyGuide:

1. Select User Options, followed by Partner Options and ensure the radio button is set to Yes before clicking Save.
2. From the main menu choose Options, then Request MaxMyInterest Authorization and enter your Max Advisor Dashboard credentials.

Don't have a Max Advisor Dashboard? You can register for free in 1-2 minutes at [MaxForAdvisors.com](https://www.maxforadvisors.com).

To import a client account into MoneyGuide, simply go to a client's My Plans page and select Manage Integrations and then click on the Max logo to search for your client's by name before you import their data into MoneyGuide.

Questions? Need Help?

If you need support using the integration, review the MoneyGuide integration support documentation available from MoneyGuide or contact MoneyGuide Support. For questions about Max, contact advisors@maxmyinterest.com for general questions or use the Contact Us page: [MaxMyInterest.com/Contact-Us](https://www.MaxMyInterest.com/Contact-Us) for client-specific issues.

