



MY FINANCIAL
EXPERT™

Employee Onboarding Guide

2026



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Step 1

Welcome email



Upon enrollment, you will receive a personalized welcome email that is unique to you.

From here, click-through to create your My Financial Expert™ login credentials and complete the enrollment process.



From: noreply@experianalert.myfinancialexpert.com

To: youremail@domain.com

Complete Enrollment Now

Dear Your Name,

Congratulations on taking the first step to protecting your finances and identity!

Set up your account now to complete the enrollment process and activate My Financial Expert® by Experian®.

- Begin by verifying your identity.
- Next, add the personal data you want us to monitor.
- We'll notify you by email if we find a match to your monitored information.

[Complete Enrollment Now](#)

Sincerely,
My Financial Expert™ by Experian



Step 2

Complete enrollment



After clicking your unique welcome email link, you will be brought to the enrollment portal to create login credentials for your account.

Notice: If your Personally Identifiable Information (PII) was not included as part of your organization's Enrollment File, you will be asked to enter your PII, including Social Security Number (SSN) and Date of Birth (DOB).



Email Address *

Confirm Email Address *

Password *

Confirm Password *

Security Question (Please select one) *

Security Answer *

- What school did you attend?
- What's your best friend's name?
- What's your pet's name?
- What is your favorite color?

By checking the box you are acknowledging that you have read and agree to the following permissible purpose statement:

By clicking "Create Account": I accept and agree to the Experian® My Financial Expert's Terms and Conditions and agree to Experian® My Financial Expert's Privacy Policy and MX Technologies, Inc.'s ("MX") Privacy Policy. I authorize CSIdentity Corporation (aka My Financial Expert(R)) and your service provider ConsumerInfo.com, Inc. to obtain and share my consumer credit report, scores, and other credit data on a recurring basis to its affiliates and its current/future service provider(s) including MX ("Authorized Parties") for the purposes of delivering personalized financial and credit based insights and services, facilitating and improving Experian services, and for related uses for which you hereby grant permission. I also authorize the Authorized Parties to gain recurring access to and store my financial account(s) and transactions for such purposes.

Create Account



Step 3

Authentication



To verify your identity and authenticate your My Financial Expert™ account you will be required to answer a series of secure questions based on your credit file.



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According to your credit profile, you may have opened a mortgage loan in or around November 2009. Please select the lender to whom you currently make you mortgage payments. If you do not have a mortgage, select 'NONE OF THE ABOVE/DOES NOT APPLY'.

- CBA
- CHASE HOME MTG
- PARKWAY MTG
- NONE OF THE ABOVE/DOES NOT APPLY

Which of the following is a current or previous employer? If there is not a matched employer name, please select 'NONE OF THE ABOVE'.

- MORRISON MAHONEY MILLER
- F J WILKES
- FARGO TRUSS SYSTEMS
- NONE OF THE ABOVE/DOES NOT APPLY

Which of the businesses have you been associated with? If there is not a matched business name, please select 'NONE OF THE ABOVE'.

- MORRISON MAHONEY MILLER
- F J WILKES
- FARGO TRUSS SYSTEMS
- NONE OF THE ABOVE/DOES NOT APPLY

Submit



Getting Started

Explore benefits, activate features, and more.

Log-in and tour the home page to:

- Add family members
- Enter additional details for monitoring
- Enable dark web monitoring
- Lock and unlock their Experian credit file

Need assistance?

Contact member services — (855) 797-0052

You and Your Children
Keep an eye on the status of your family's financial and personal information.

DB [Add a child](#)

Item	Monitoring	Count
DB	Monitoring	3
Social Security	Monitoring	1
Phone	Monitoring	2
Driver's License	Monitoring	1
Passport	Monitoring	1
Medical ID Numbers	Monitoring	2

Secure VPN Active
Shield your browsing activity from hackers on public networks.
[Install](#)

Password Manager Active
Manage and access account logins from a secure vault.
[Install](#)

Safe Browser Active
Browse the web privately and securely.
[Install](#)

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Home Financial Wellness ^ Identity Protection ^ Identity Restoration ^ Education Center ^

- Financial Management
 - Financial Insights
 - Credit Report
 - VantageScore® Overview
 - Experian® CreditLock
 - Financial Account Takeover
 - Financial Calculators
 - VantageScore Simulator™
- Identity Protection
 - Digital Privacy
 - Identity Monitoring
 - Data Broker Removal
- Identity Restoration
 - ID Restoration
 - ID Theft Insurance
- Education Center
 - ID Restoration
 - ID Theft Insurance

Your Experian credit® file is locked

[Unlock your Experian credit file](#)

[Learn More about Experian CreditLock](#)

Remove your personal info from people search sites.

[Start first scan](#)

[Learn more >](#)

See your complete financial picture.

With financial management features you can:

- Bring all your financial information together in one place
- Set financial goals and track your progress.
- Receive personalized insights based on your unique financial situation.

[Connect your accounts >](#)



Homepage Overview

Areas to Explore

1. Navigation Bar

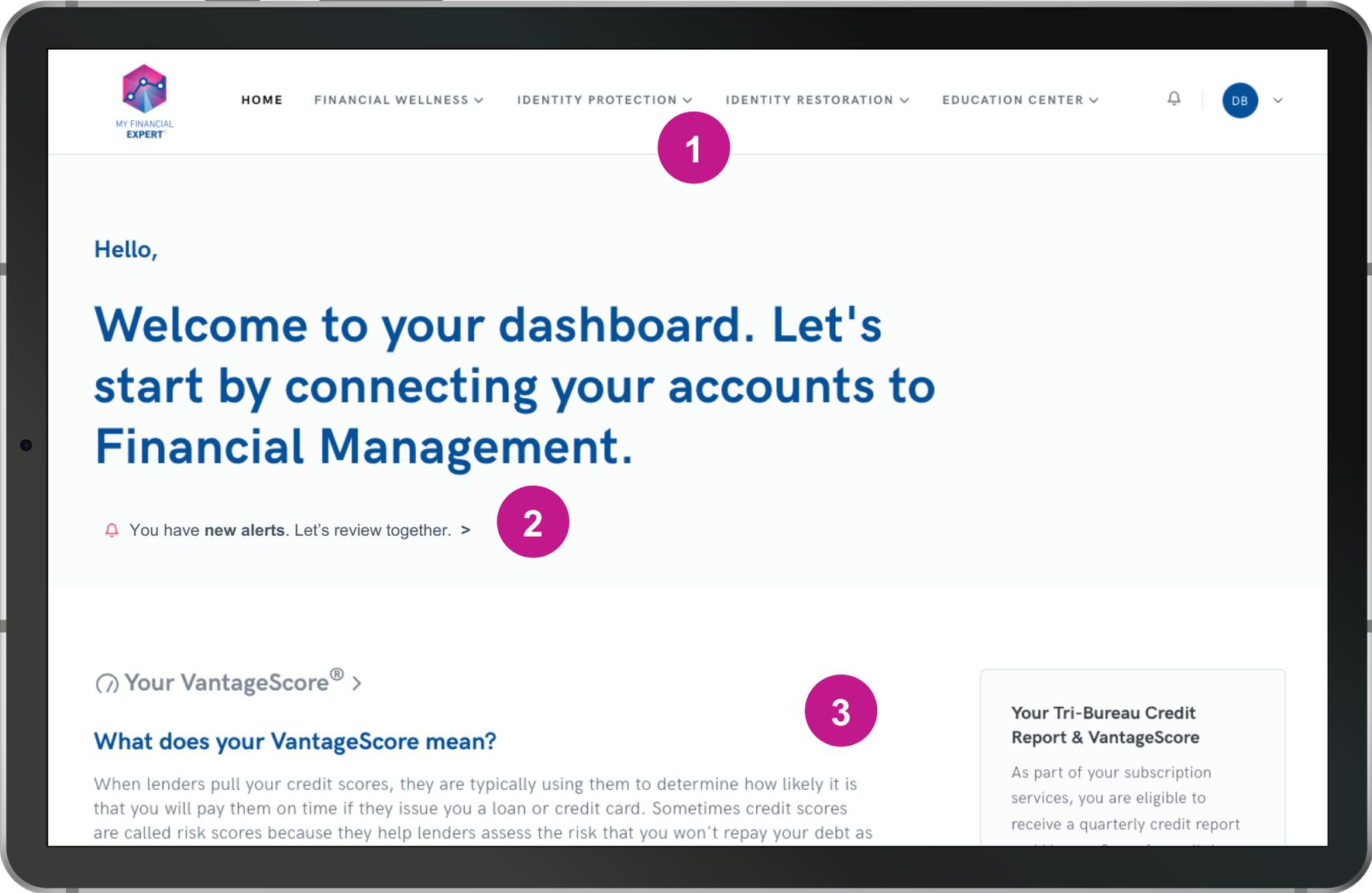
Explore features organized by benefit category.

2. Alerts

Review credit monitoring and identity protection alerts.

3. Credit Overview

See how lenders view you and track progress towards your goals.



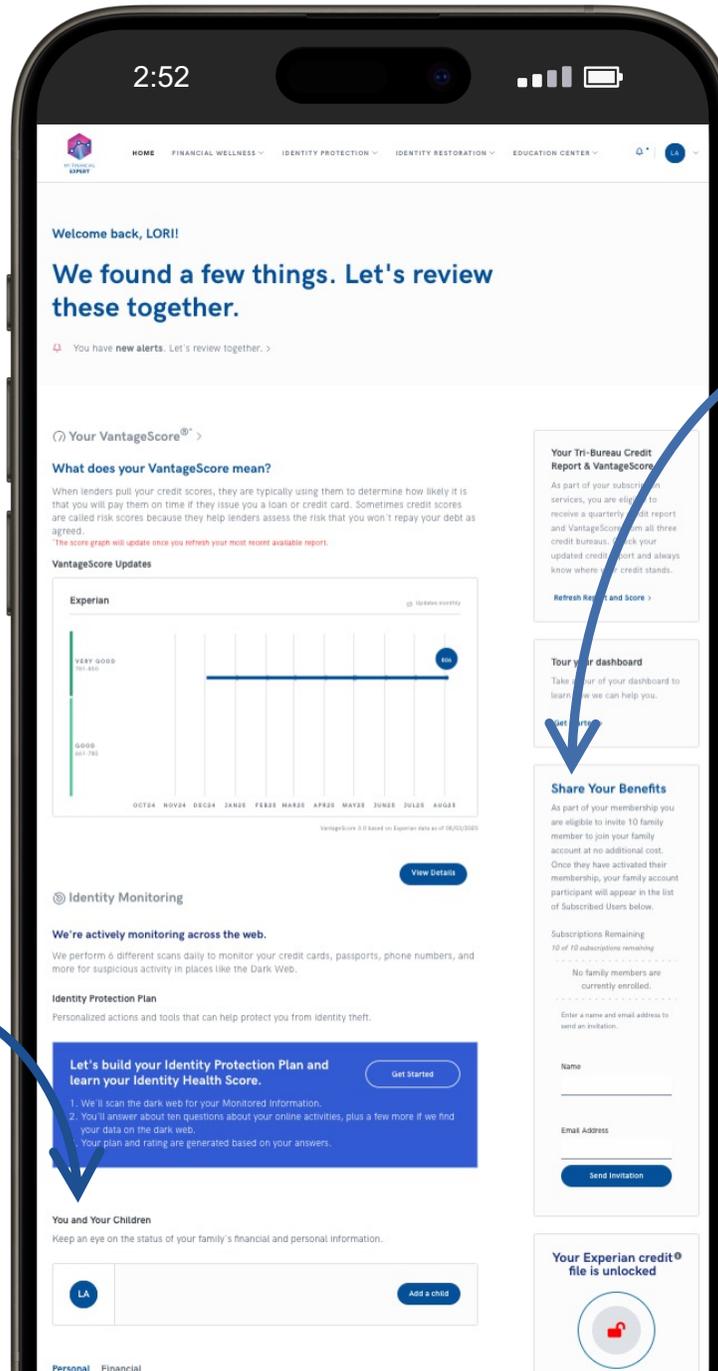
Add Family Members

Easily Add and Manage from your Homepage

After logging in, scroll down the homepage to add children or adult family members and enter additional details for monitoring.

Under 18 Years of Age

Add and monitor alerts for you and your children right from the home page.



Over 18 Years of Age

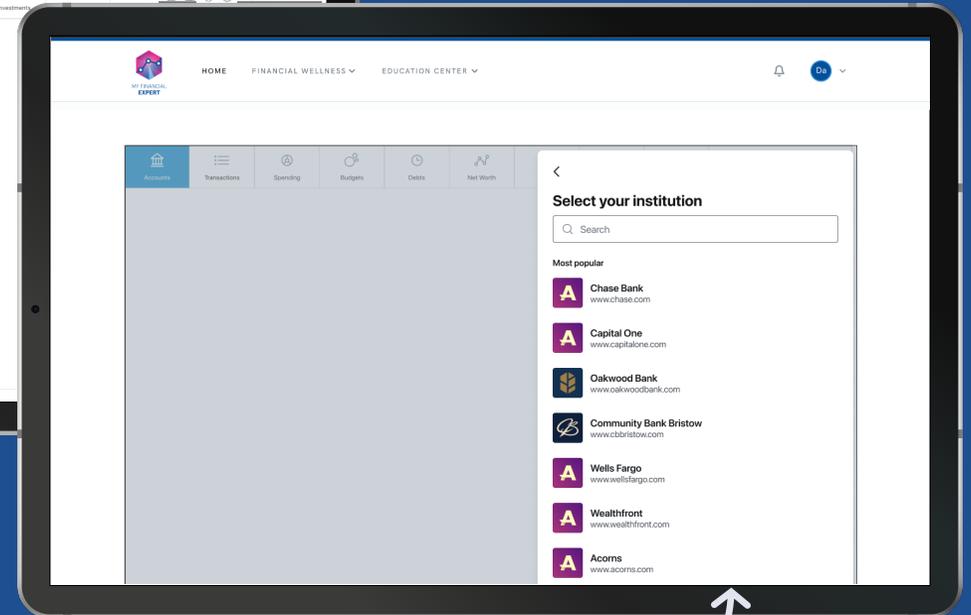
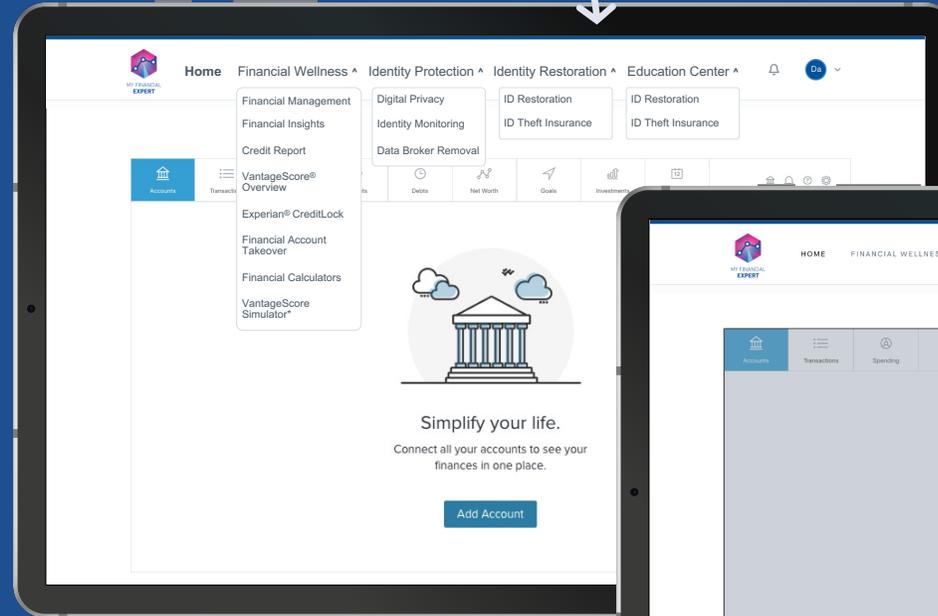
1. Enter their name and email in the **Share Your Benefits** widget on the right-side of the homepage.
2. They'll receive an **email invitation** to **create their own login**.
3. Finally, they'll **complete the enrollment process** then can **login to explore benefits** and activate features.



Link Financial Accounts

1. On the **Navigation Bar** click **Financial Wellness**.
2. From the dropdown menu select **Financial Management**.
3. This will deliver you to the **Financial Management dashboard** where you can **add accounts** and more.

Navigate to the Financial Management Page.



Select your institution and login using your account credentials.

