

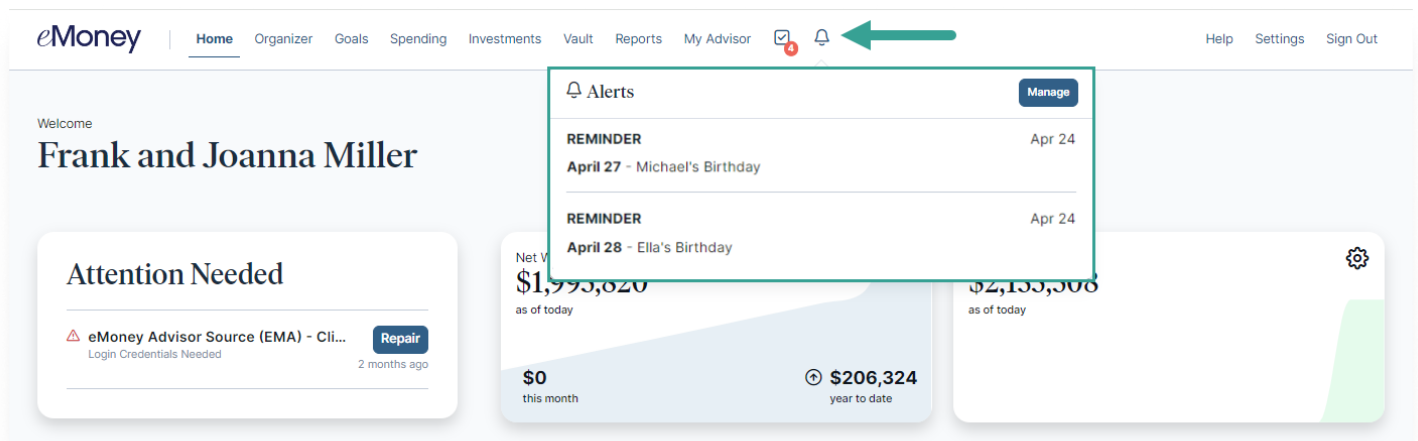
This User Guide details how to access Alerts and their settings on your Client Site.

Alerts can help you stay up-to-date in the planning process. Note that your Advisor may customize the alerts you see on your website.

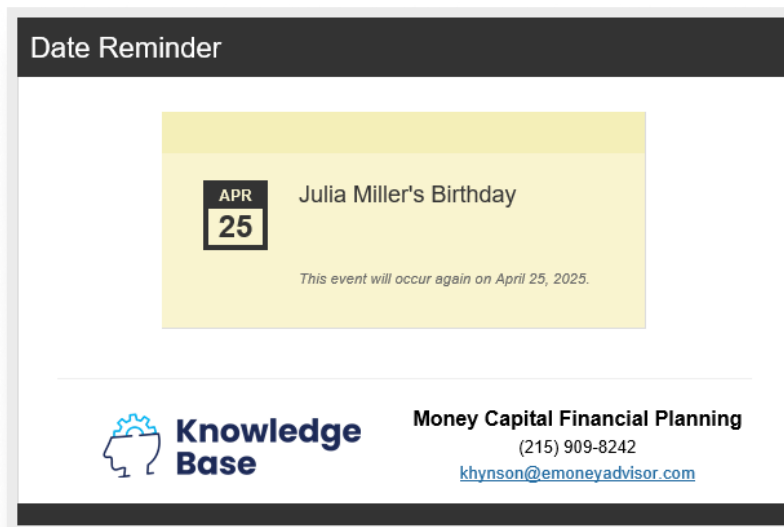
## Viewing Alerts

### Personal Financial Website Alerts

Click the **Bell** icon on your navigation bar to display triggered Alerts.

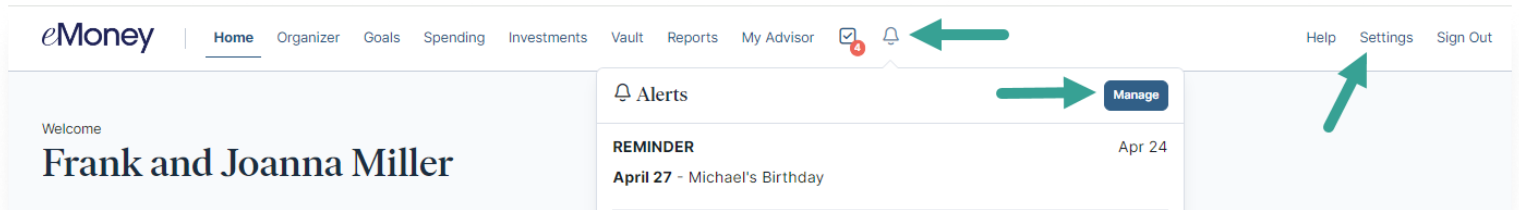


## Email Alerts



## Accessing Alerts Settings

Click the **Bell** icon, then click **Manage** or click **Settings** on your navigation bar.

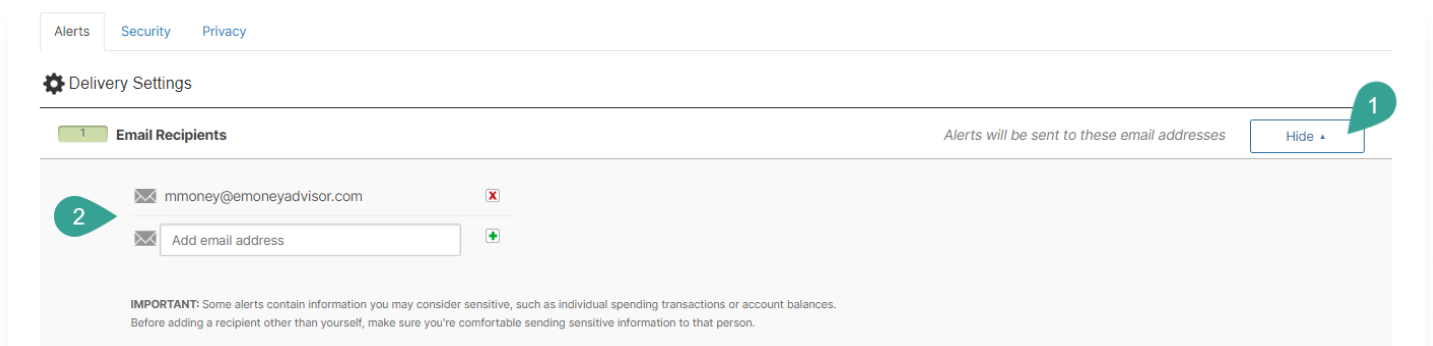


## Delivery Settings

The Delivery Settings allow you to decide which events will trigger a notification.

## Adding or Editing Email Recipients

Click the drop-down on the right side of Email Recipients to review the email addresses listed. To remove an address, click the **x** icon. To add a new email address, click the **+** icon.



## Home Page Notifications

Toggle Home Page Notifications to **On** to see triggered alerts for a set number of days before they expire.

Use the toggles on the left side of your screen to turn any alerts on / off. Configure the parameters of that specific alert on the right.

The screenshot shows the 'Alerts' settings page. At the top, there are tabs for 'Alerts', 'Security', and 'Privacy'. Below is the 'Delivery Settings' section with a gear icon. Under 'Email Recipients', there is a 'Show' button and a dropdown menu for 'Show notifications on your home page for' with options from 1 to 90 days. The 'Home Page Notifications' toggle is currently set to 'On'. Below this is the 'Personal Finance' section with a bar chart icon. It lists several alerts: 'Weekly Financial Summary' (Off), 'Low Cash Balance' (Off), and 'High Credit Balance' (Off). Each alert has a description and a 'Show' button.


## Personal Finance Alerts

These alerts allow you to set up financial notifications and will reflect the spending information from connected accounts.

The screenshot shows the 'Personal Finance Alerts' settings page. It features a bar chart icon and the title 'Personal Finance'. Below are several alert settings, each with a toggle, a title, a description, and a 'Show' button. The alerts are: 'Weekly Financial Summary' (On), 'Low Cash Balance' (Off) with a threshold of \$500, 'High Credit Balance' (On) with a threshold of \$2,500, 'Large Expenses' (Off) with a threshold of \$1,000, 'Large Deposits' (Off) with a threshold of \$1,000, 'Bank Fees' (Off) with a threshold of \$1, 'Budget Exceeded' (On), and 'FICA Maximum Approaching' (Off).

## Investment Alerts

These alerts display information about the investment holdings in your portfolio.

 Investments

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**Investment Activity** When specific types of [investment transactions](#) occur

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**Concentrated Position** When a stock or bond makes up [more than this much](#) of your portfolio:

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**Excess Cash Position** When cash makes up [more than this much](#) of your portfolio:

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**Security Prices** [Monitor the prices](#) of stocks and mutual funds

## Reminders

These alerts can be customized with date or age-based options.

 Reminders

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**End of Year Planning** Annual financial housekeeping tips

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**Insurance Policy Anniversary** Annual reminder of policy renewal date

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**Tax Filing Dates** When tax filing dates are approaching

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**Frank's Social Security Benefits** [When Frank is approaching age](#)

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**Joanna's Social Security Benefits** [When Joanna is approaching age](#)

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**Required Minimum Distributions** Annual reminder to meet your [RMD requirements](#)

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**Tasks Assigned To You** Reminder to complete tasks assigned by your advisor

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**Documents Shared To You** Triggered when someone shares a document or folder in the Vault with you

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**Important Dates** [Birthdays, anniversaries, or any other date you want to remember](#)

## Weekly Financial Summary

This summary is emailed to the address(es) on file. Your Advisor may not initially enable this email while your account details are being set up.

### Financial Summary

<b>BUDGETS</b> for April	<b>\$810</b> budgeted	<b>\$0</b> spent
<b>NET WORTH</b> as of Apr 20, 2024	<b>\$1,987,984</b>	<b>-1.0%</b> this month
<b>INVESTMENTS</b> as of Apr 20, 2024	<b>\$2,102,072</b>	<b>-2.1%</b> this month
Bank of America - HSA	\$41,385	<b>no change</b>
Other manually entered accounts	\$1,685,870	<b>-2.7%</b>

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