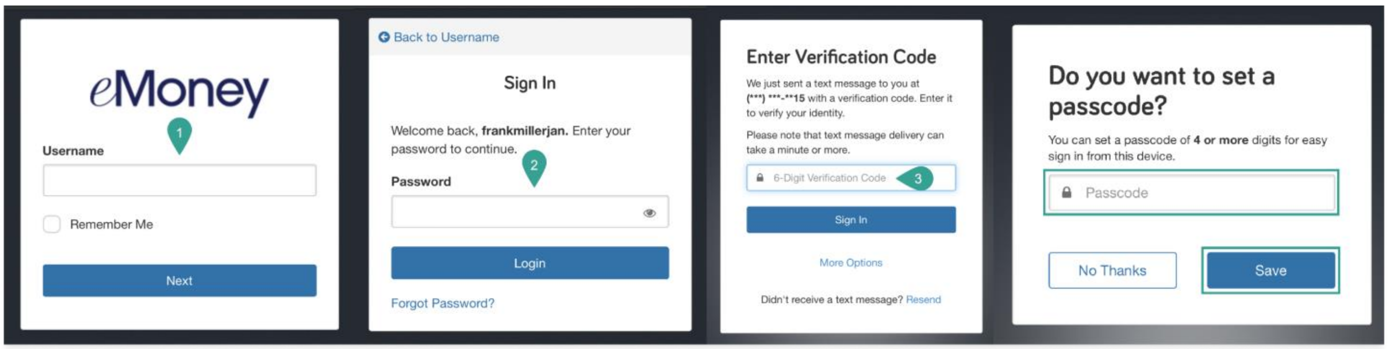
Mobile Website Overview

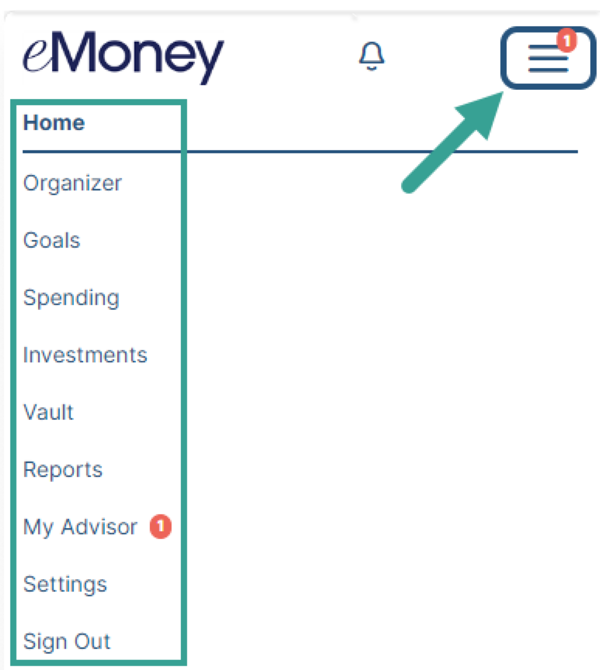
This training guide demonstrates the functionality of the Mobile version of your Personal Financial Website.

The Mobile Website includes the same features as the desktop version, including a consolidated view of your information. To access your website, use your standard login URL. You can refer to the confirmation email sent to you when you first registered your access.

From the login screen, follow the steps to enter your **Username**, **Password, and Verification Code**. You may be prompted to enter a passcode if you previously set one up in Security Settings (outlined later in this guide). If you have not set a passcode, you can set one up the first time you access the mobile site.

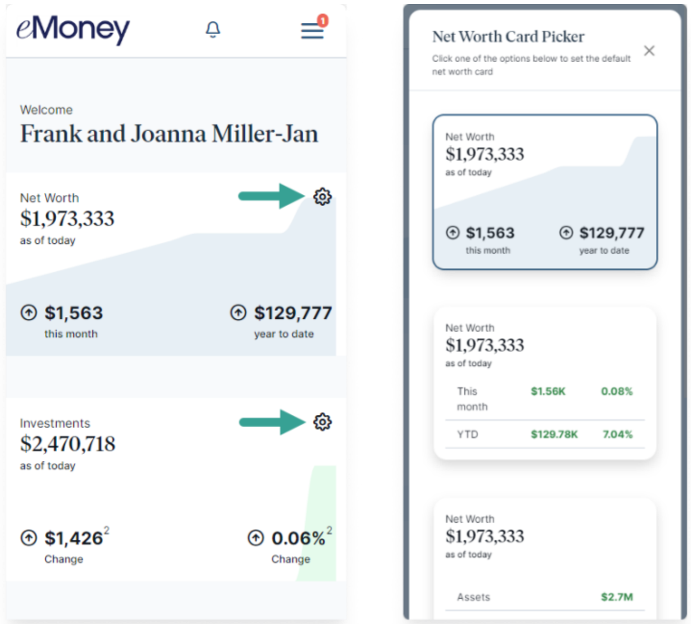


1. Once successfully authenticated, you will be taken to your Home page, which consolidates all the data we have entered on your website. Click the **3-line hamburger** menu button to access the main navigation.

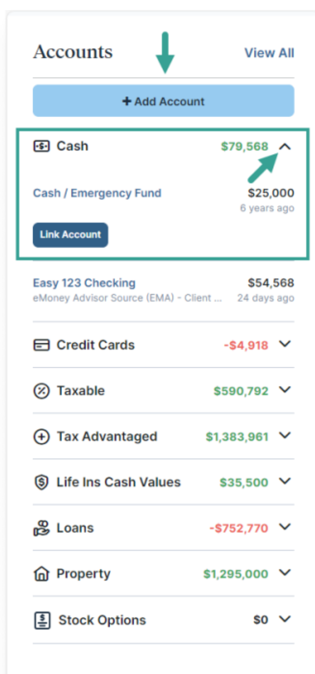


Home

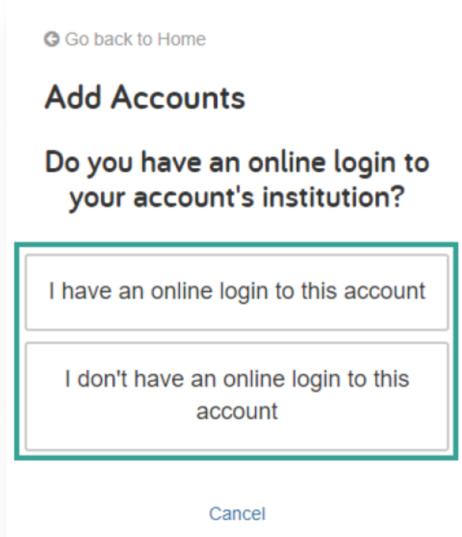
1. Beginning with the **Net Worth** and **Investments** cards, your website will allow you to customize your experience. Click the **gear** icon on each card to pick your preferred view.



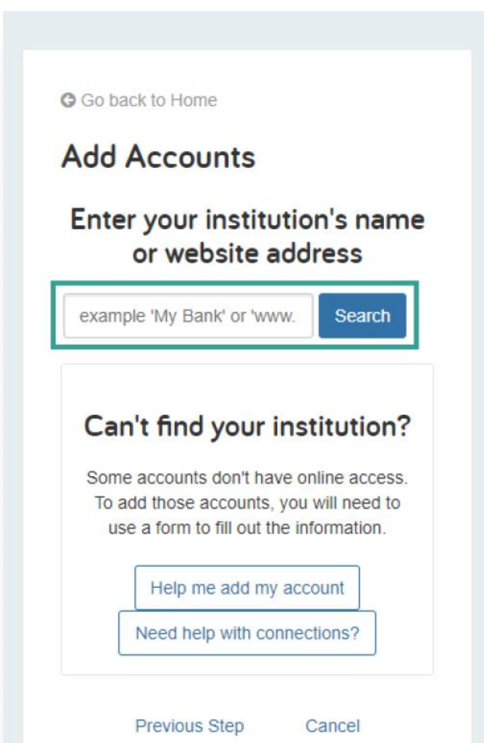
2. Scrolling down the Home page, you will see your Accounts organized into categories. Click the arrow on a category to expand or close the view of accounts within that category. If you notice any accounts missing, click **+ Add Account** to connect to your financial institution.

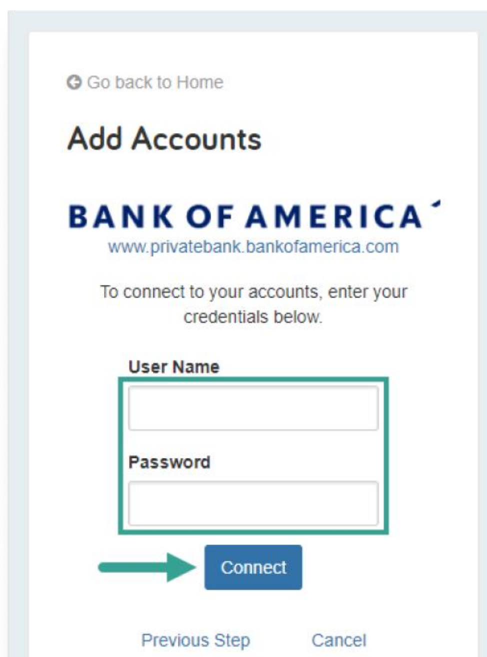


3. You will be asked if you have an online login to the account. Selecting I don't have an online login, will prompt you to add your account manually. For this example, we will choose the first option – **I have an online login to this account**.



4. **Search** for your institution and select the one where your accounts are held. Enter your institution credentials and click **Connect**. After your credentials are authenticated, your accounts will populate into your Organizer.





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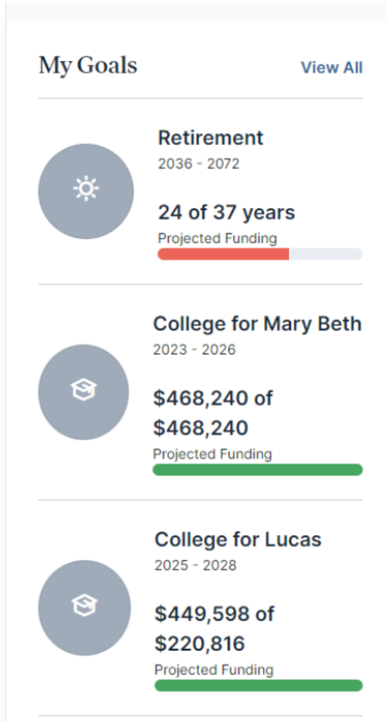
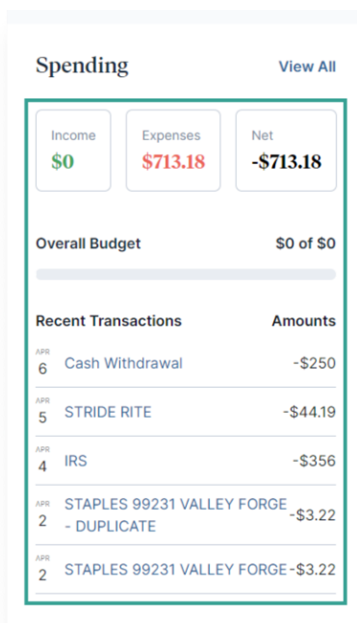
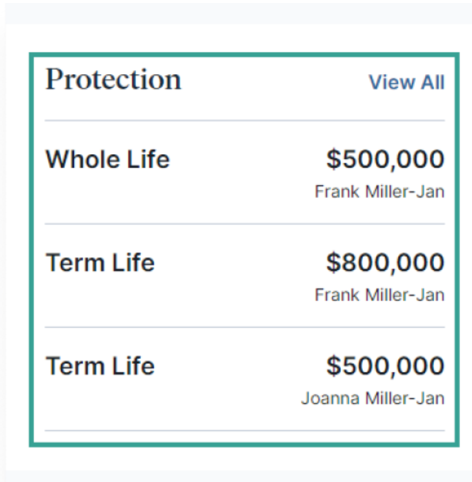
5. Back on the Home page, below Accounts, is a snapshot of your **Goals**, showing each one's projected funding. Red indicates the projected funding is falling short, and green means the Goal is currently projected to be fully funded.



6. Below your Goals is a snapshot of your **Spending**, Overall Budget, and Recent Transactions. After you have connected your bank accounts, such as your Checking account and Credit Cards, your transactions will populate the **Spending** section of your website.

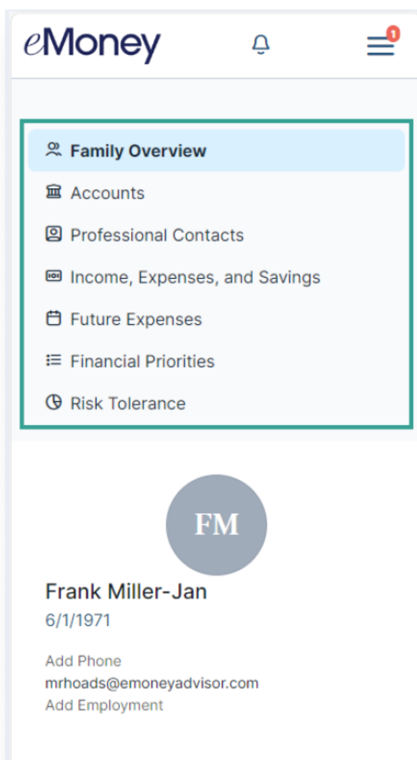


7. Lastly, below Spending is Protection, which displays your three highest valued insurance accounts, i.e., Life Insurance, Homeowners Insurance, Auto Insurance, etc.



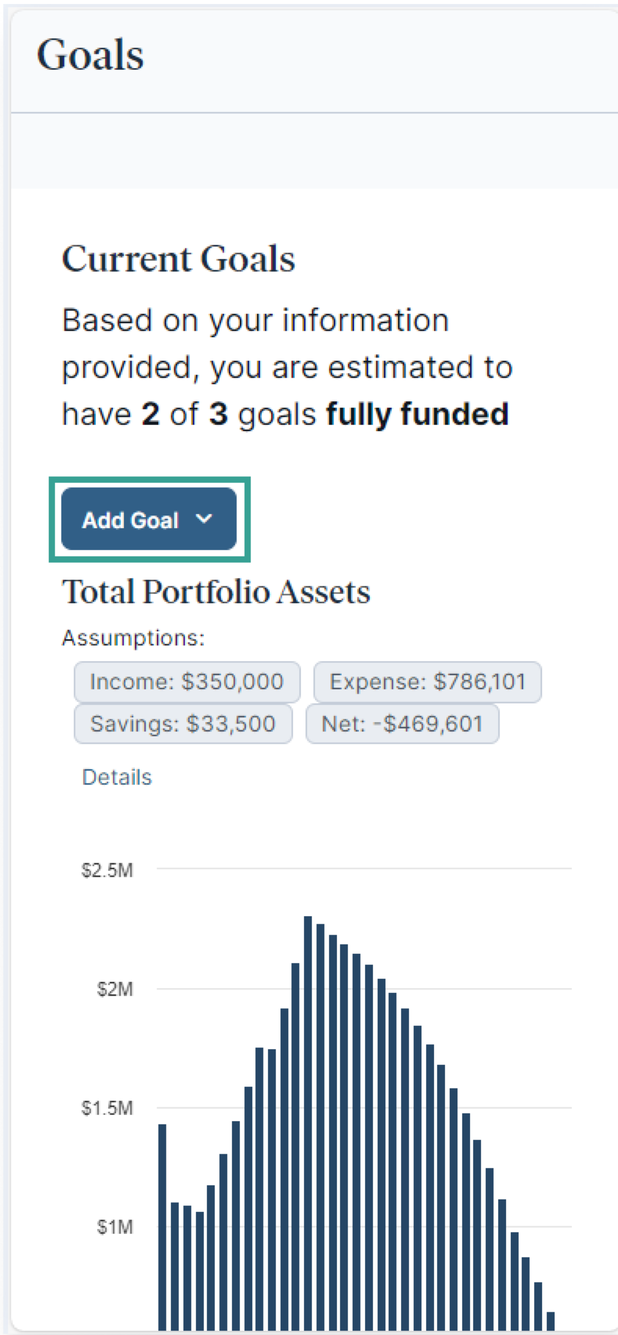
Organizer

The **Organizer** is where you can view and modify your information. Click the corresponding links for more details about Property, Accounts, Income, Expenses, Savings, and Future Goals. To edit your family and contact information, click your name.



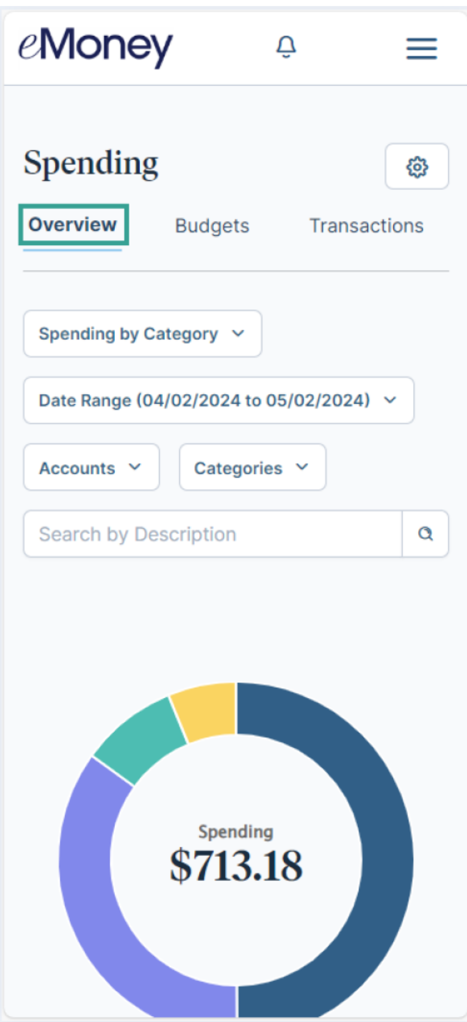
Goals

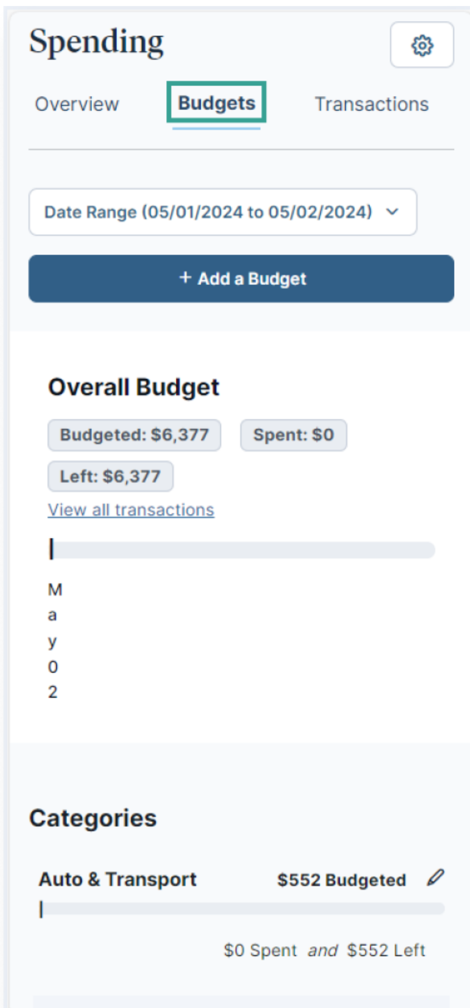
Goals allow you to track funding towards critical financial milestones. Create new Goals by clicking Add Goal and assigning a funding source. You can track existing goals by scrolling down your page. Each goal can be individually analyzed, but the landing screen will give a great view of everything all in one place.

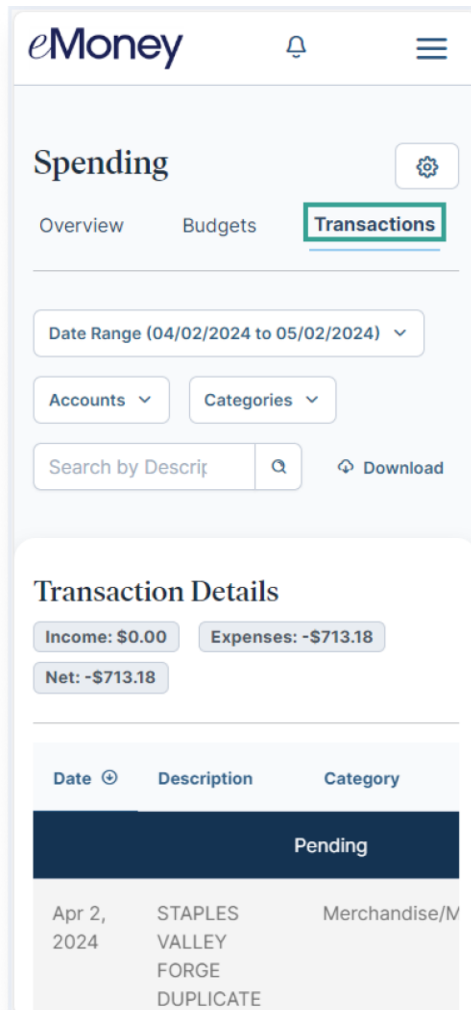


Spending

1. The **Overview** tab includes a pie chart of your spending by category. You can customize a specific Date Range, view one Account or All Accounts, and view different charts by selecting the View drop-down.
2. The **Budgets** tab helps you track your monthly spending. You can customize your Budget by adding, editing, or deleting categories.
3. The **Transactions** tab contains transactions from your connected accounts sent by your financial institution. The information in both tabs is used to populate your Overview.

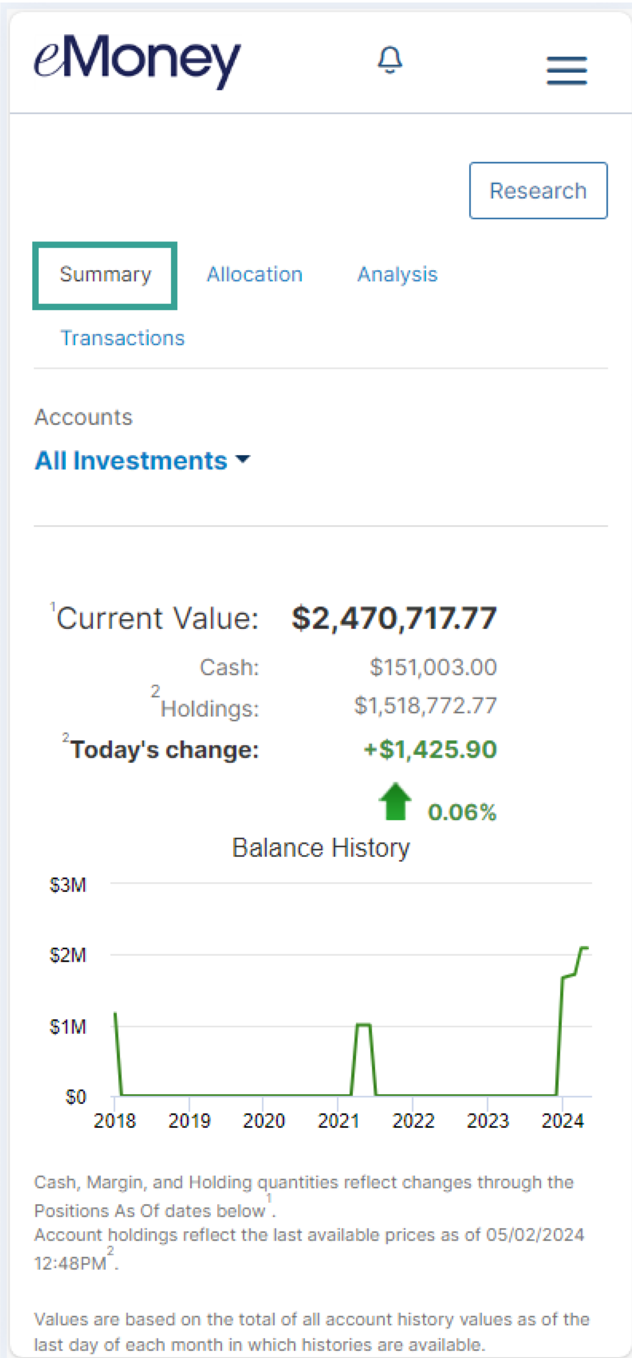


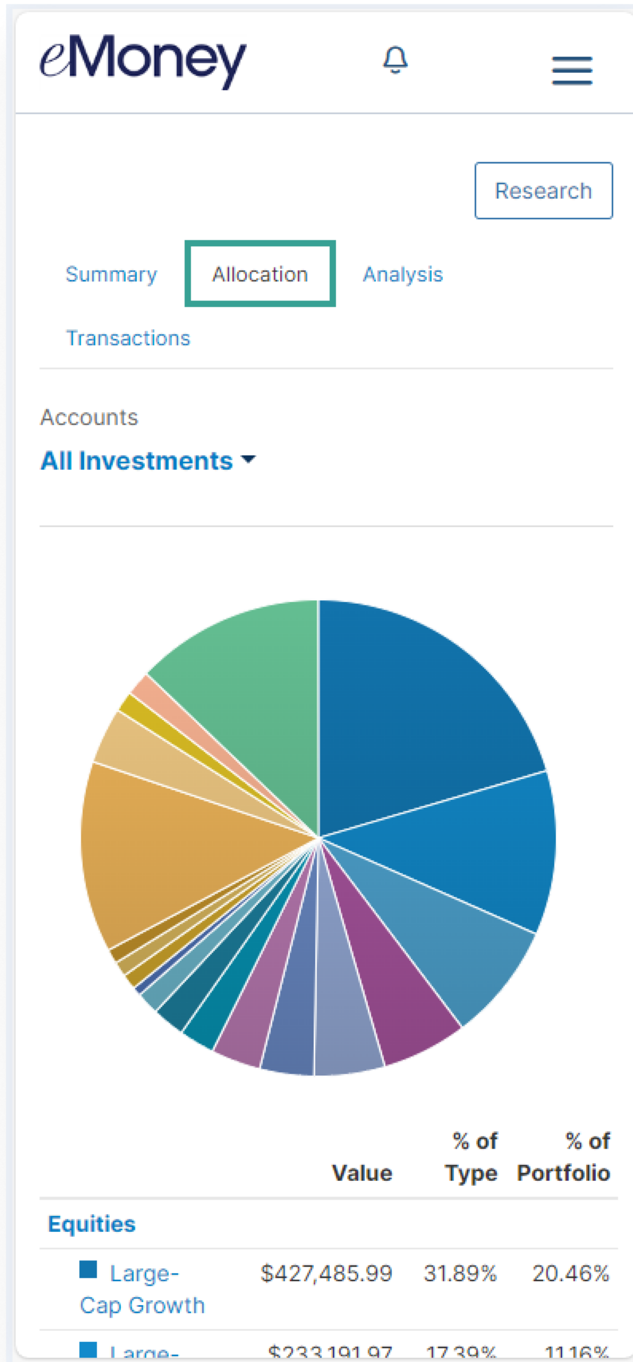




Investments

1. The **Summary** tab reviews your account Balance History for all Investments. Clicking into an account will filter the Holdings and Balance History on the account level.
2. The **Allocation** tab will display your allocation of your total investment portfolio and individual accounts.





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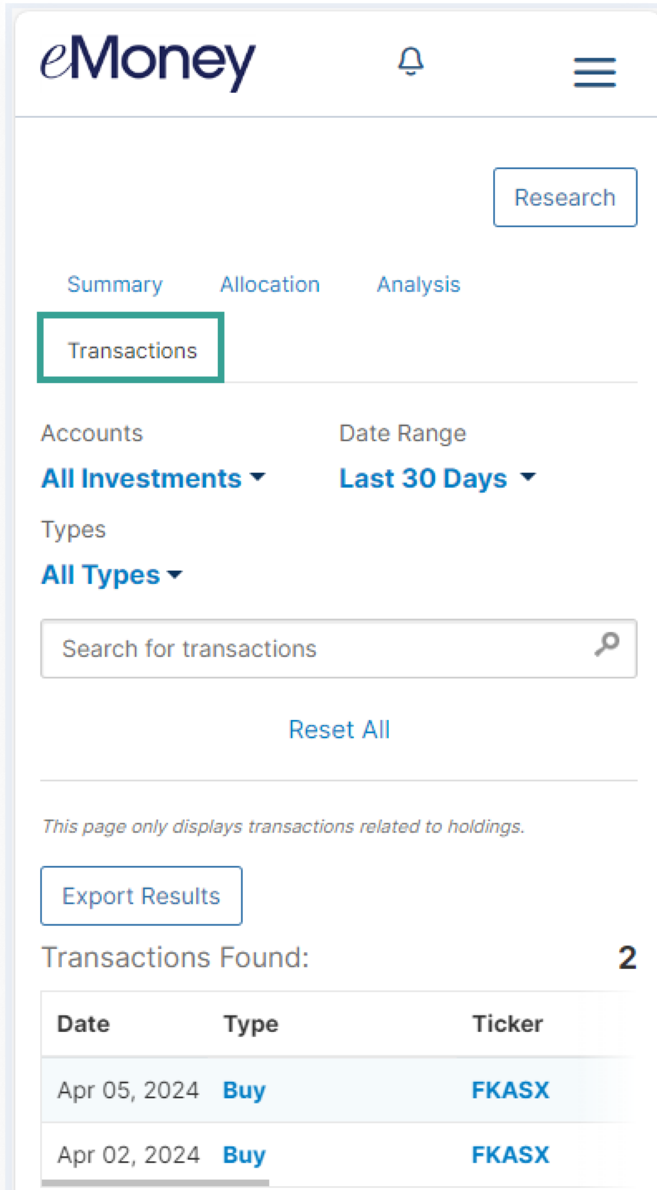
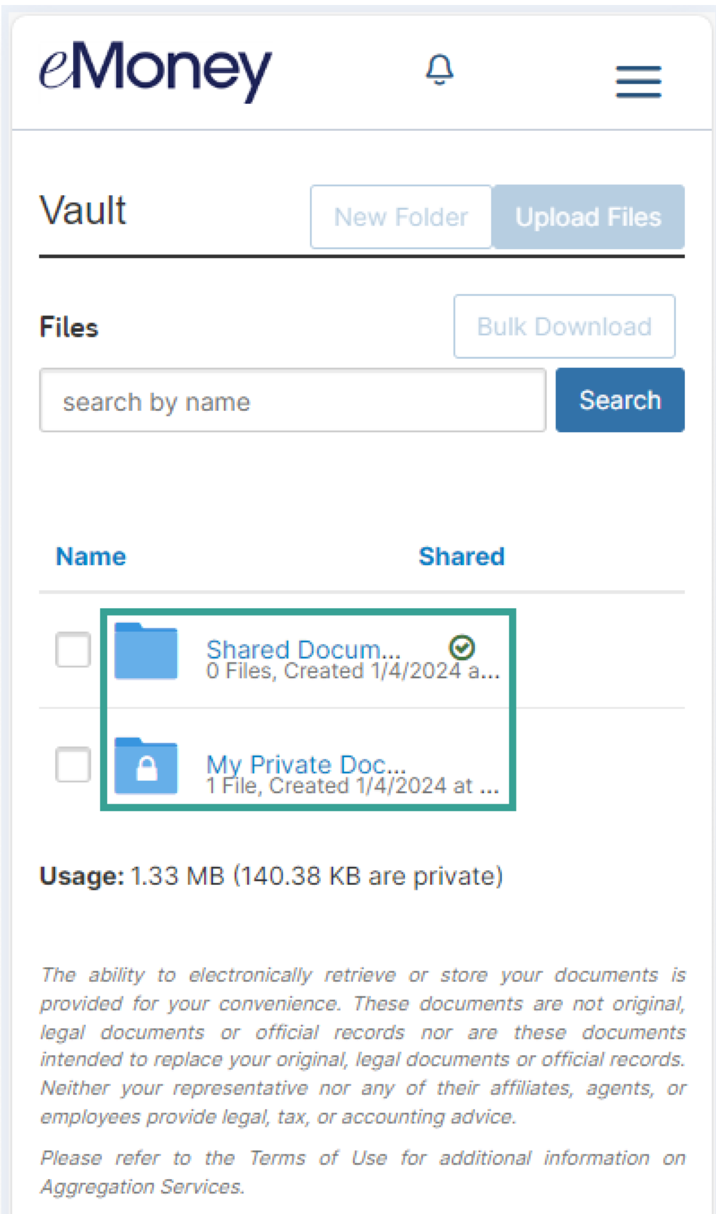
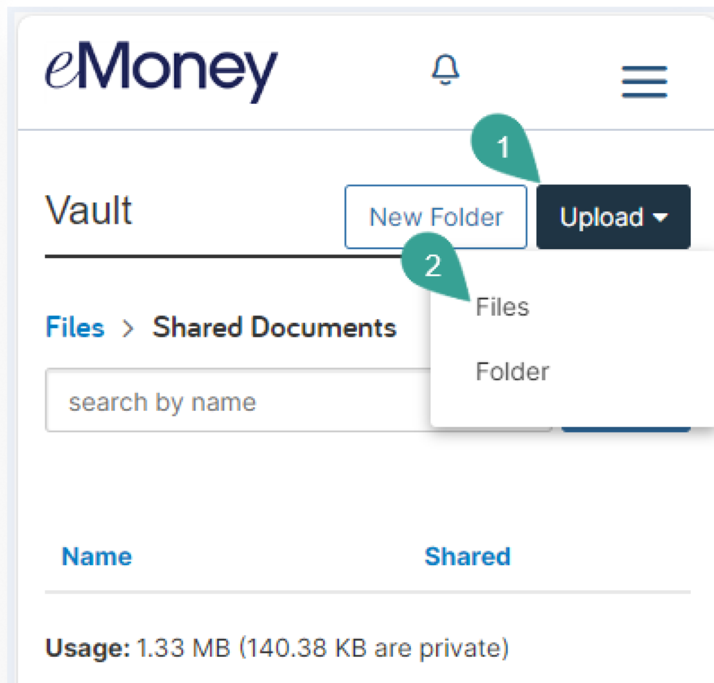
3. The **Analysis** tab provides an insightful chart with the net change in total value since your account was added to your Personal Financial Website.
4. The **Transactions** tab displays your investment transactions, such as Buys, Sells, and Dividends. This information is coming directly from your connected financial institution.



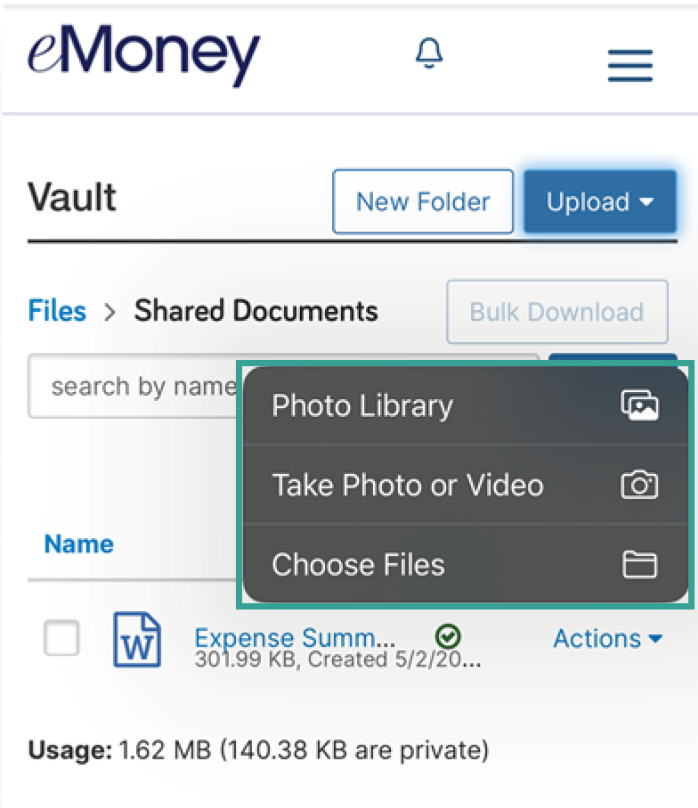
Vault

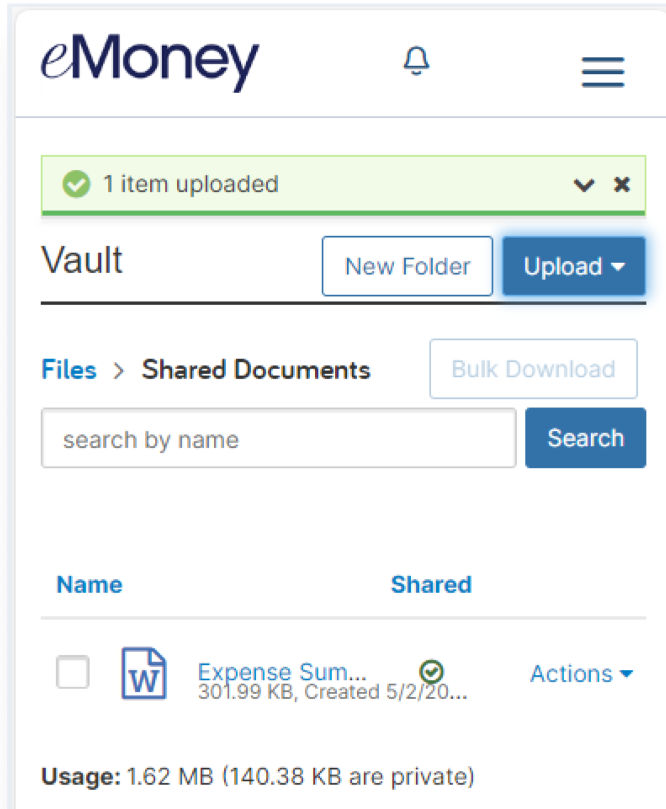
Your **Vault** is where you can access all previously uploaded files and upload new files. To upload a file, click into either the My Private Documents or Shared Documents folder and click **Upload**.





1. Choose to upload from your **Photo Library, Take Photo or Video**, or **Choose Files** from your device.



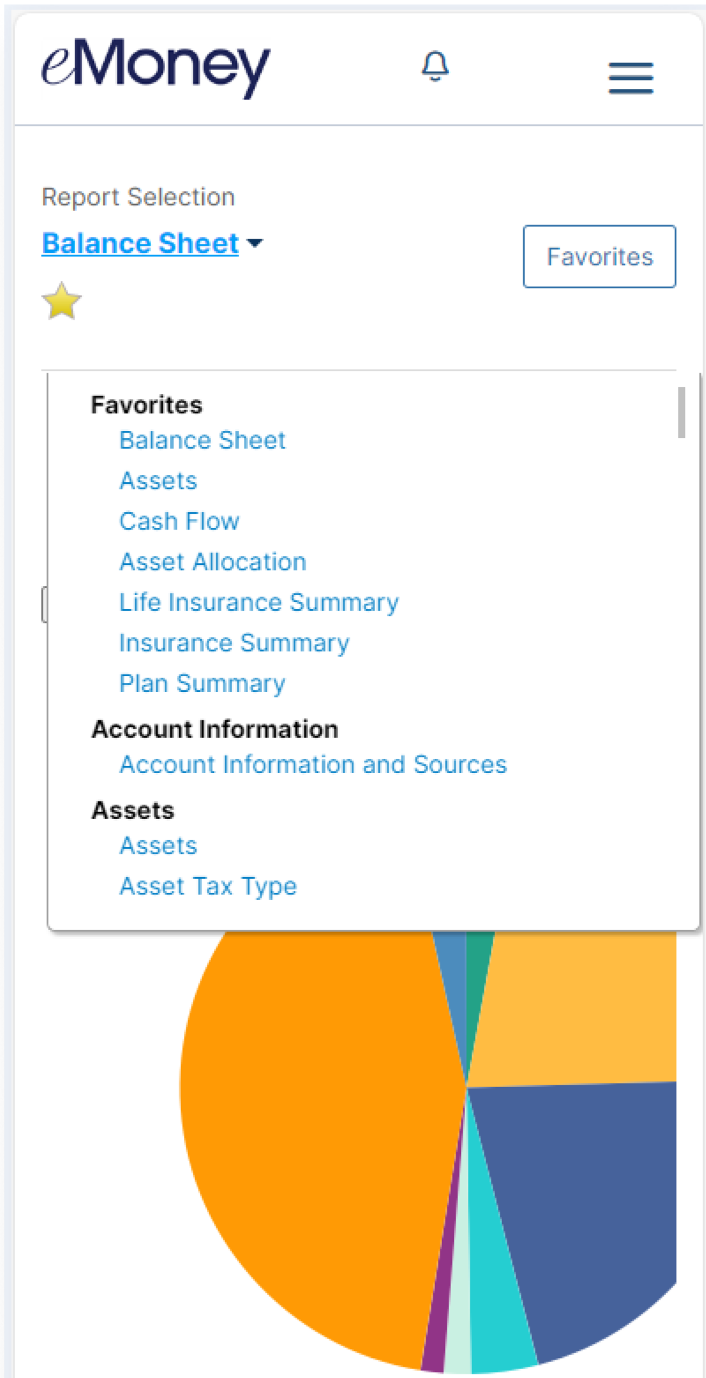


Note

- Note that taking a photo with your camera will save the image directly into the Vault and not be stored on your device.
- Most common file types are supported.
- The individual file size limit is 30MB.

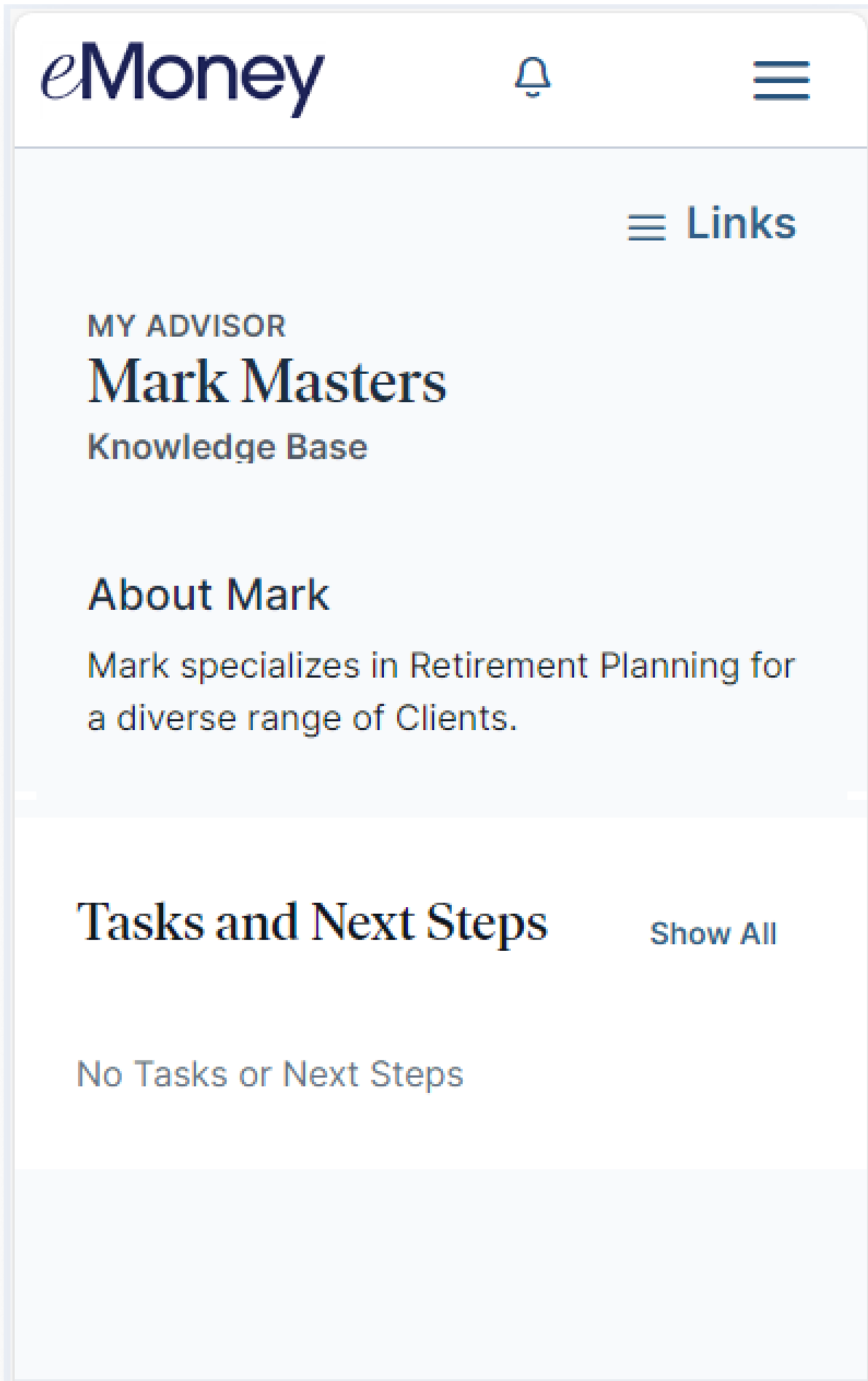
Reports

Use the Reports page for more investment and portfolio information. Click the **Report Selection** drop-down to see your available reports.



My Advisor

The **My Advisor** tab shows information and any potential contact links for them.



Settings

1. The **Alerts** tab allows you to turn various alerts and reminders on and off, such as when your budget exceeds a certain amount, when your insurance policy anniversary is approaching, and more. The **Alerts bell icon** will also trigger notifications.
2. Use the **Security** tab to set up and manage your mobile passcode, password, and security questions.
3. The **Privacy** tab allows you to set up and review your Spending Privacy Permissions.