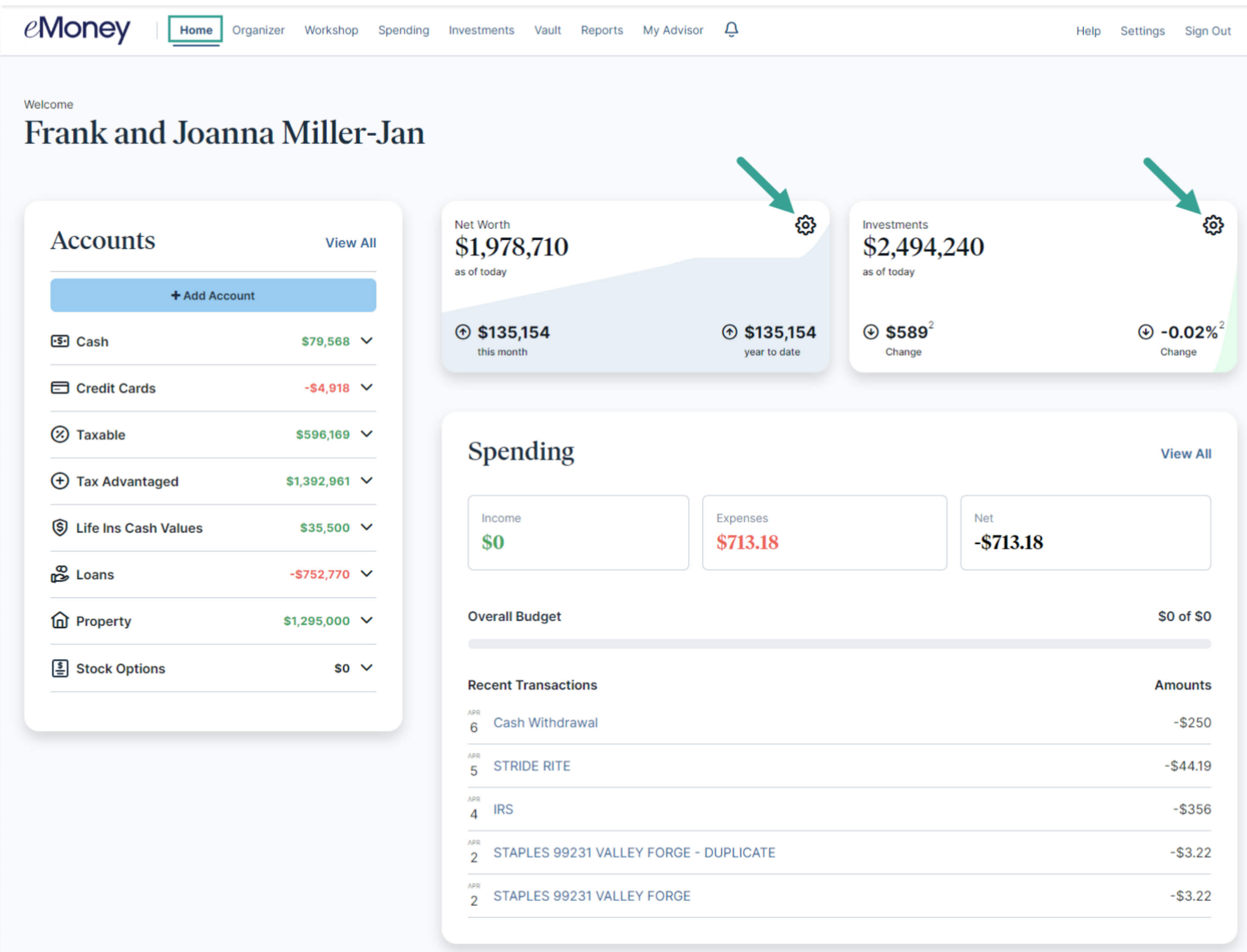
Personal Financial Website Overview

This user guide will provide an overview of the features of your Personal Financial Website.

Your website is designed to give you the tools to organize your financial life and help you stay connected with your finances in one simple consolidated view. Before your first login, you will be prompted to establish three security questions and set up 2-Factor Authentication.

Home

Your **Home** page provides a high-level view of your financial information. This page is divided into separate tiles representing the information in a website section. Begin customizing your experience by clicking the **gear icon** in your Net Worth and Investments tiles.



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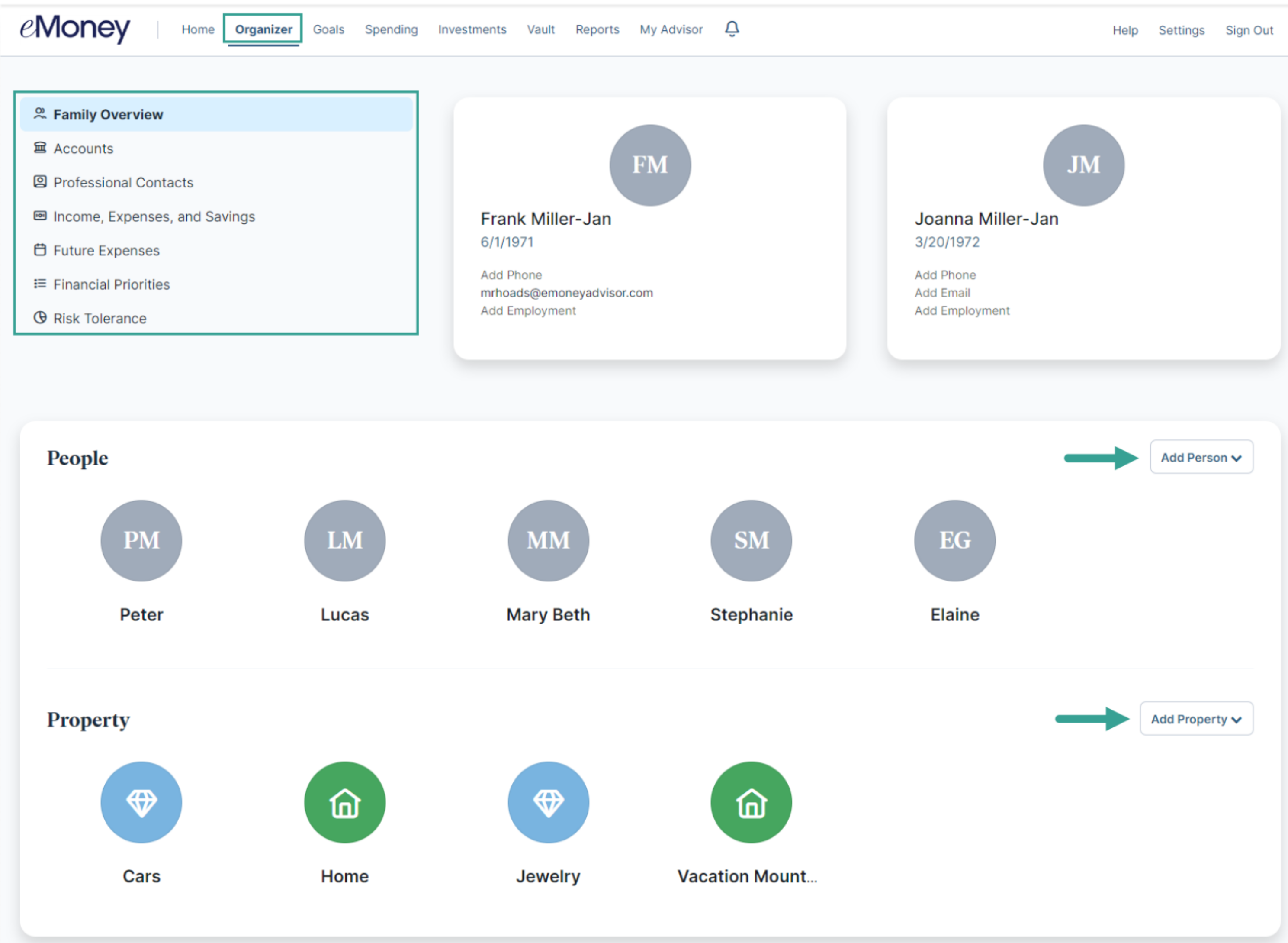
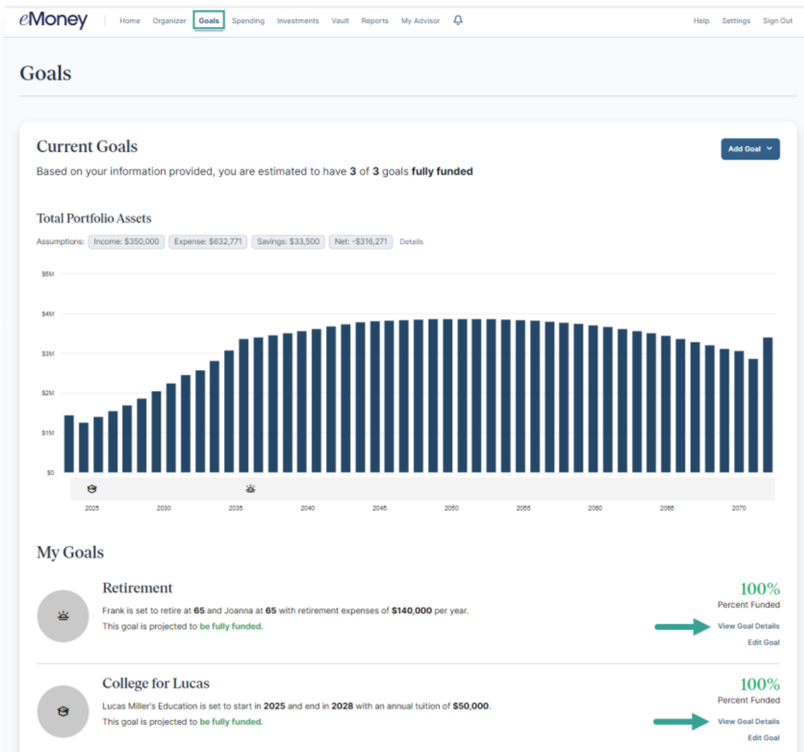
Organizer

1. The **Organizer** will help you consolidate all your important financial information into one place. You can click the **sections** on the left-hand side to add your accounts and other financial data.
2. You can also click **Add Perso**n or **Add Property** to add to the immediate Family Overview. The information within the Organizer will be used to populate other website areas, including the Home page.

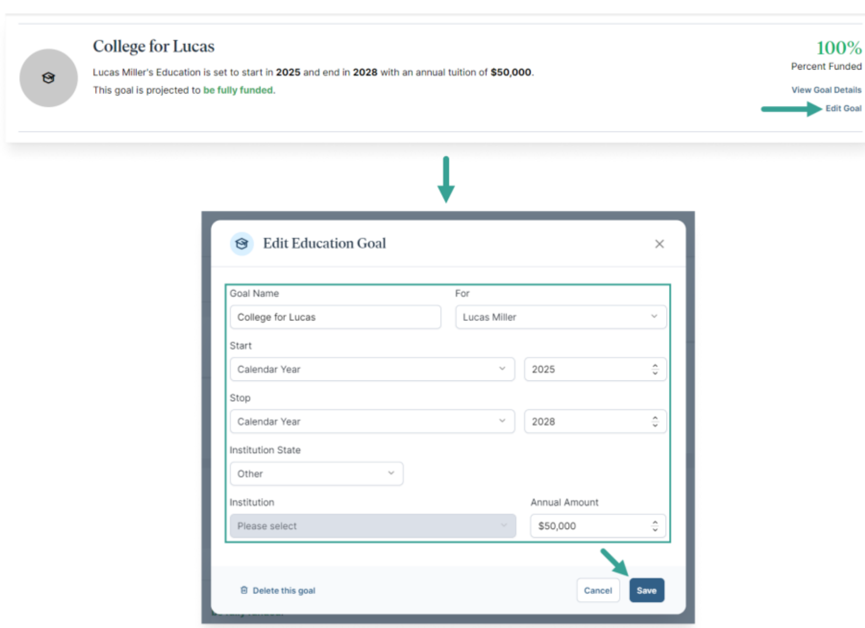


Goals

1. The **Goals** page allows you to track your Goals over time and view their impact on your financial situation. Click **View Goal Details** for insight into projected costs, funding, and suggested actions to improve results. The chart displayed may differ depending on your Advisor's settings.

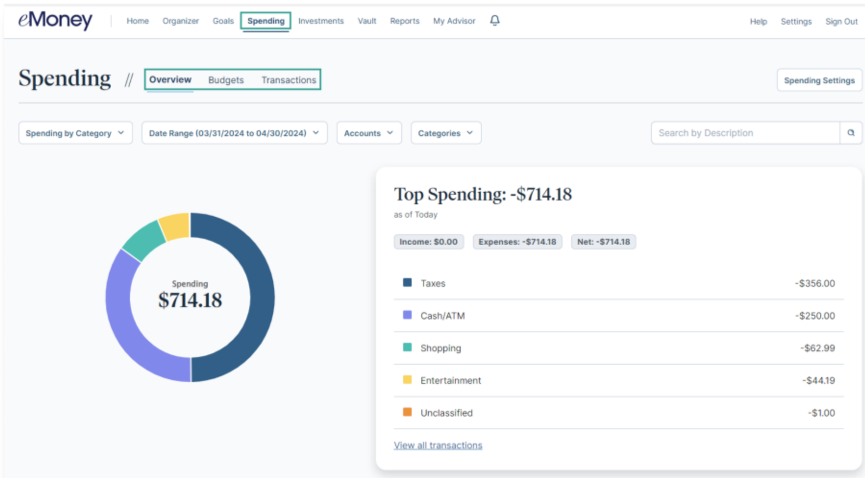


2. Clicking **Edit Goal** allows you to modify the details of your Goals.



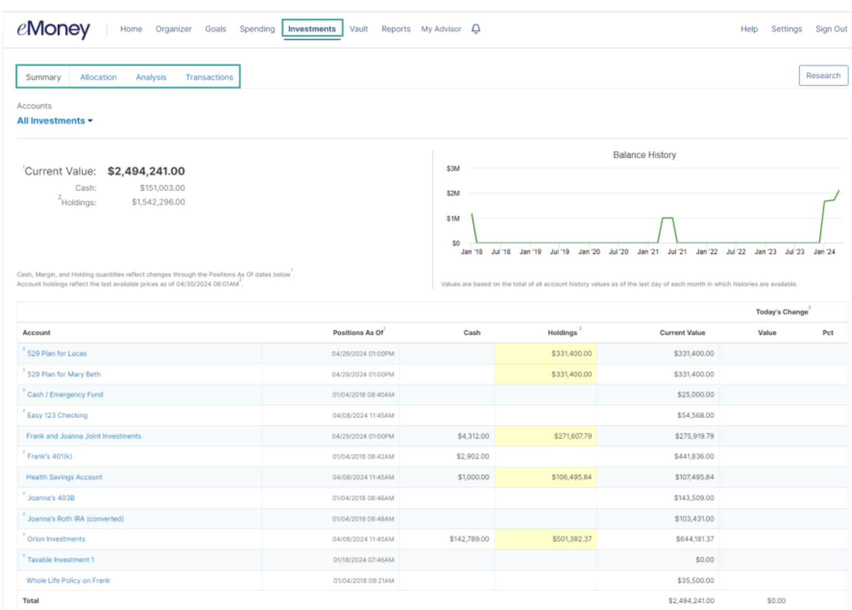
Spending

The **Spending** page gives you a clear view of your monthly spending. This area includes an **Overview**, **Budgets** tab, and **Transactions** tab. Use these three tabs to view your spending and current budget accurately. Note that if there is no information on this screen, a bank account or credit card must be added to your Organizer's Accounts section.



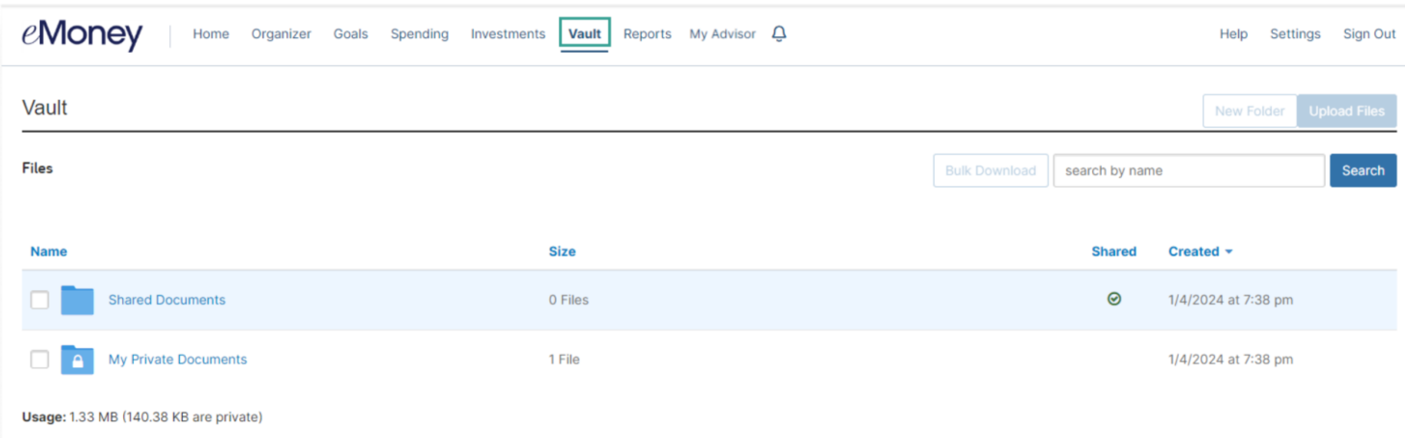
Investments

The **Investments** page comprises four components – Summary, Allocation, Analysis, and Transactions. These will provide you with an overall view of your investments and the ability to view individual account activity and asset breakdowns.



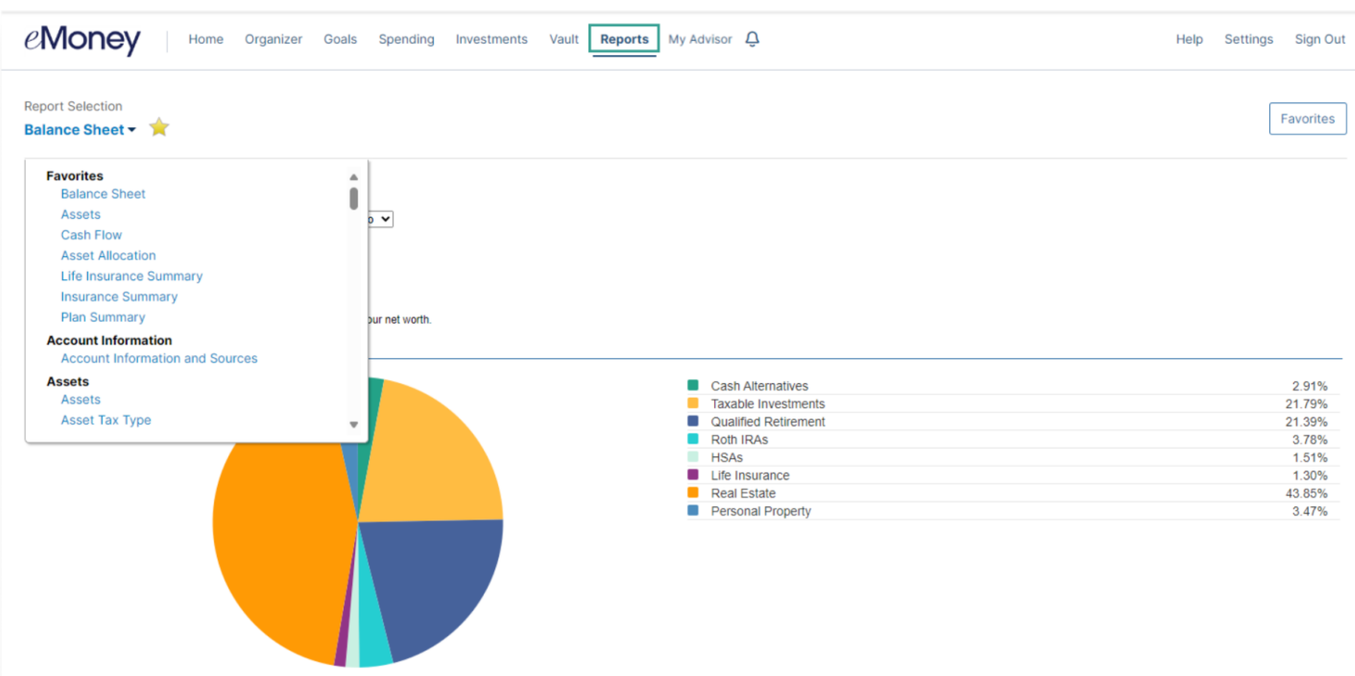
Vault

The **Vault** is a secure, searchable repository in which files are stored by your Advisor for your review and where you can store files. To upload a file, click either the **My Private Documents** or **Shared Documents** folder, then click Upload Files. The My Documents folder is hidden from your Advisor, so if you want your Advisor to see a document, upload it into the Shared Documents folder.



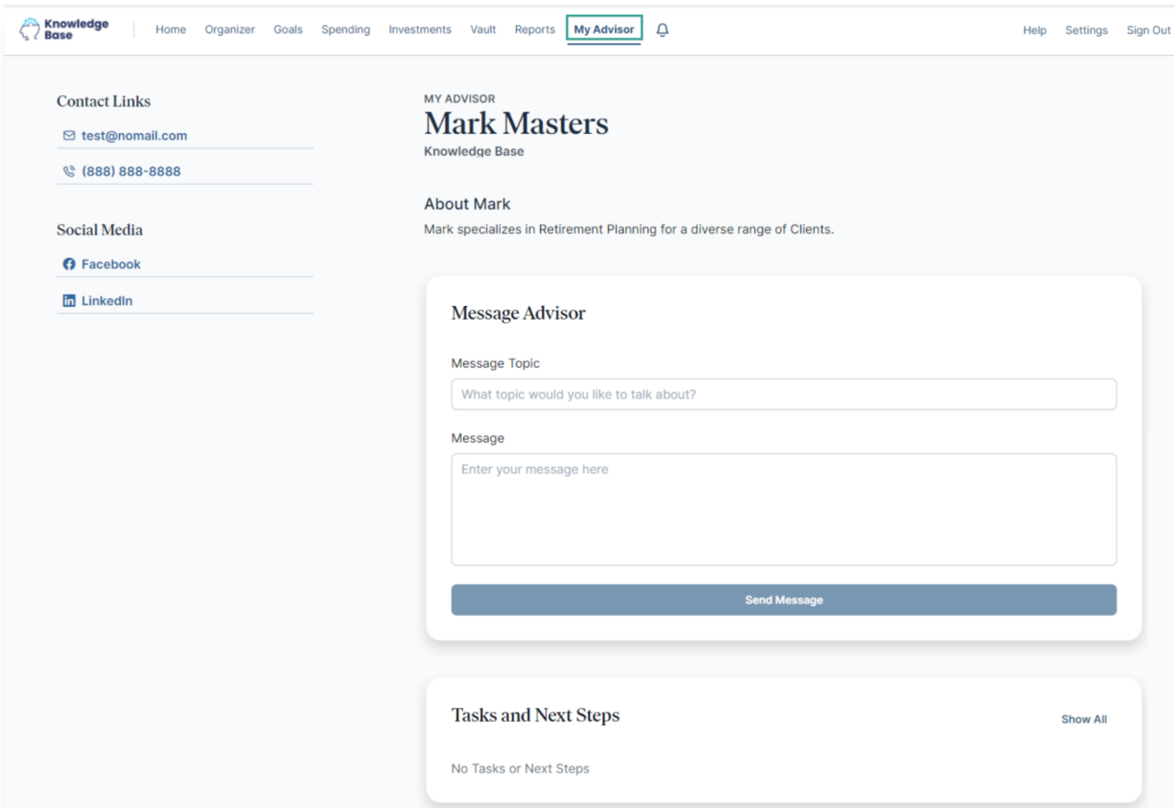
Reports

The **Reports** tab provides a series of reports about your current financial situation.



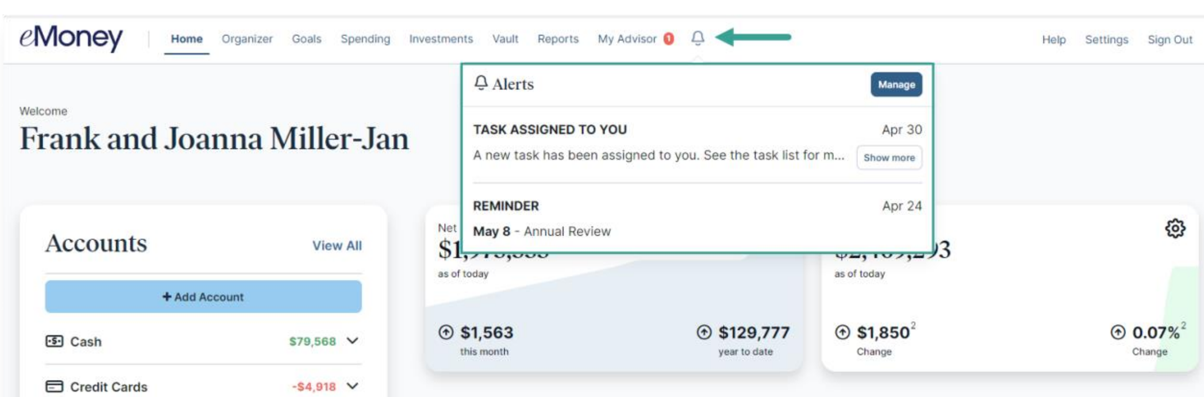
My Advisor

The **My Advisor** page displays information about your Advisor and any relevant links for them.



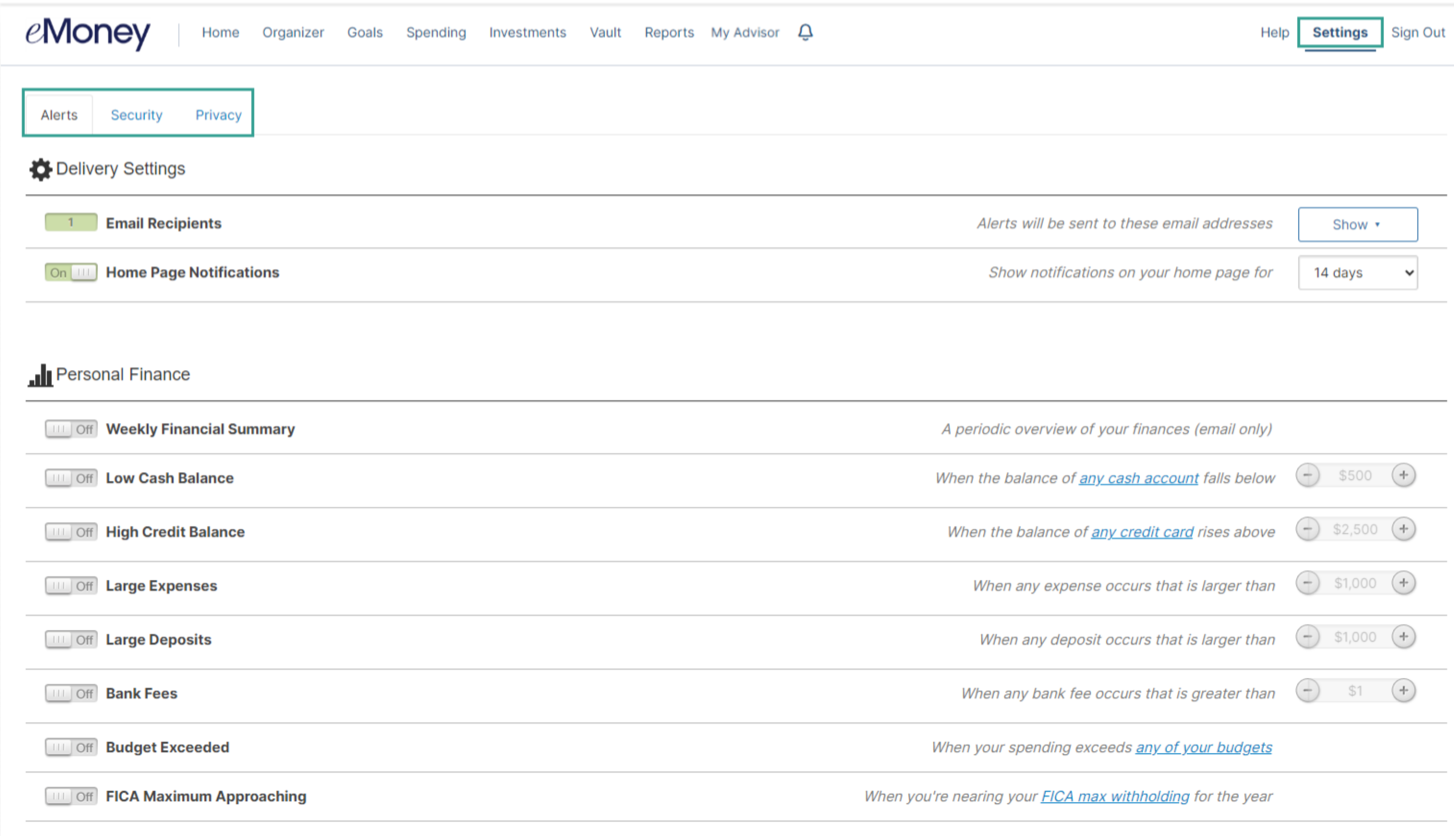
Alerts

The **Alerts Bell** icon will notify you of any triggered alerts or tasks assigned to you by your Advisor. Click **Manage** to set up your Alert parameters. Click **Complete** when you've finished the task to notify your Advisor.



Settings

The **Settings** page is where you can set Alerts, update your Security information, such as passwords and security questions, and set your Privacy Settings, which allows you to determine what level of access your Advisor has when viewing your Spending and Budgeting data.



Note

If you do not see any of these features, contact your Advisor with any questions.