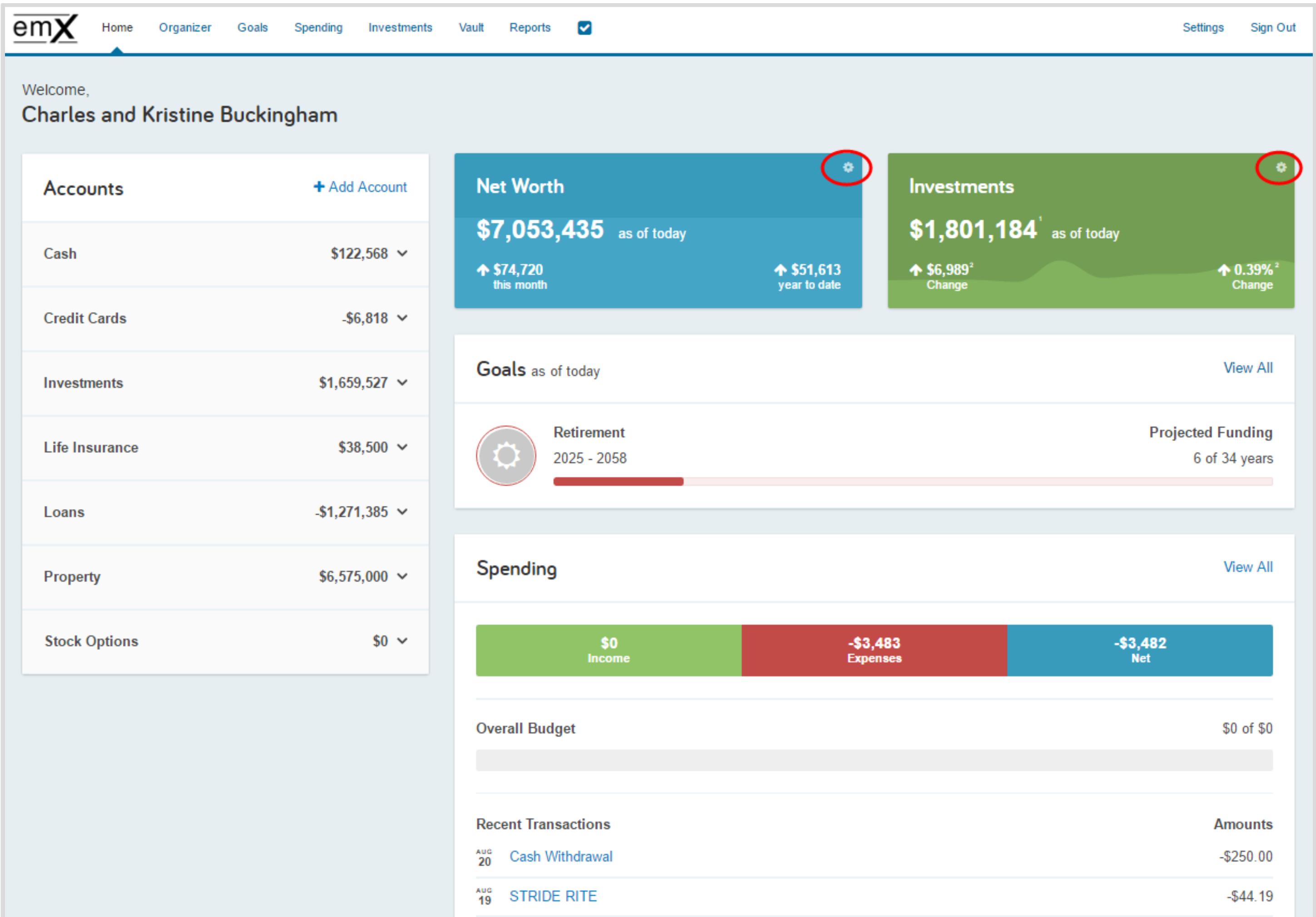
Website Overview

This training guide will overview your new website! This Personal Financial Management site provides you with the tools to organize your financial life. Using this wealth management portal will help you stay connected with your finances in one simple consolidated view.

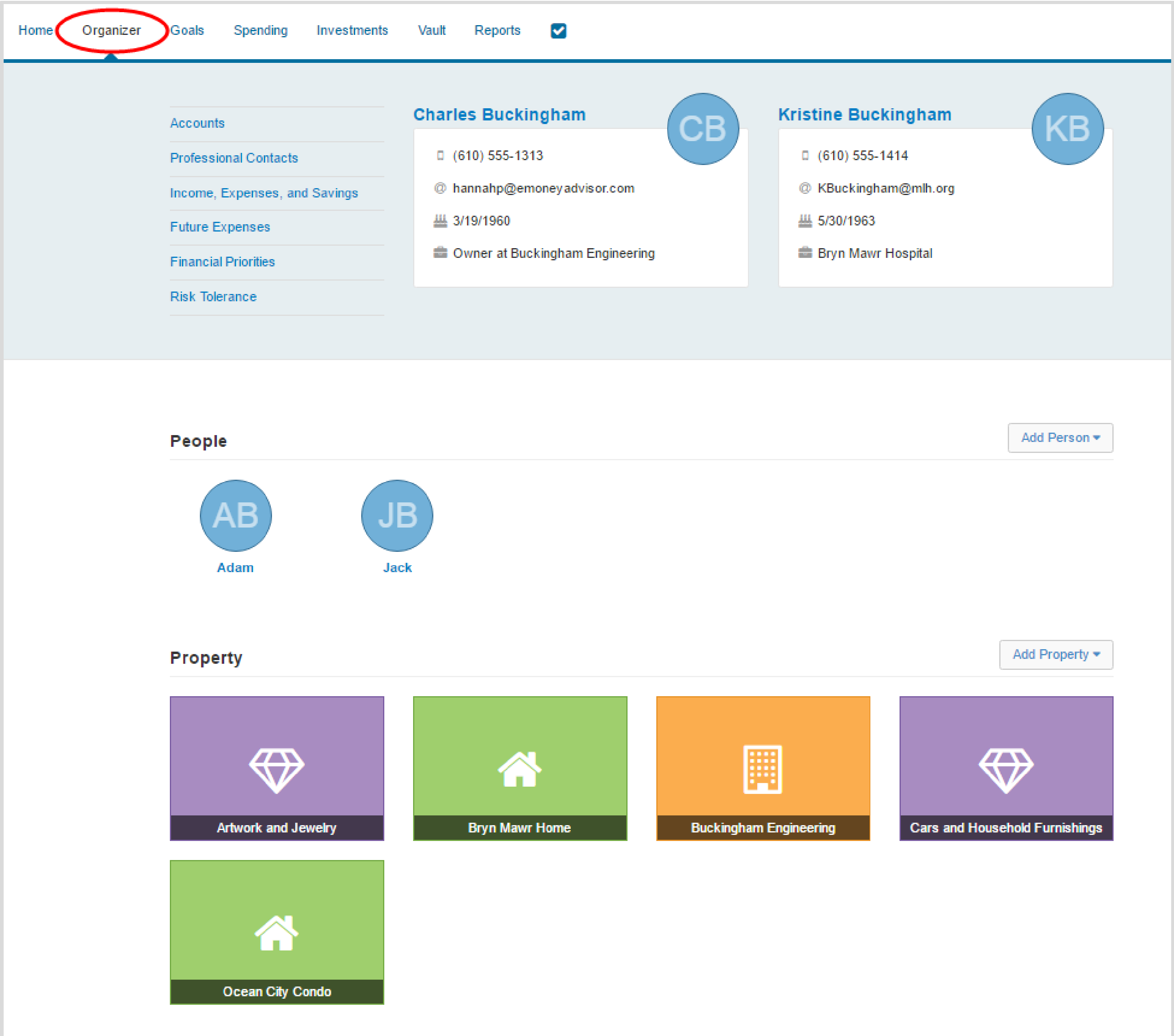
Before your first login, you will be prompted to establish 3 security questions and set up 2-Factor Authentication.

1. Your **Home** page is a living snapshot of your financial wellbeing. The Home page is a high-level view of your financial information. This page is divided into separate tiles that represent the information contained within a particular section of the application.

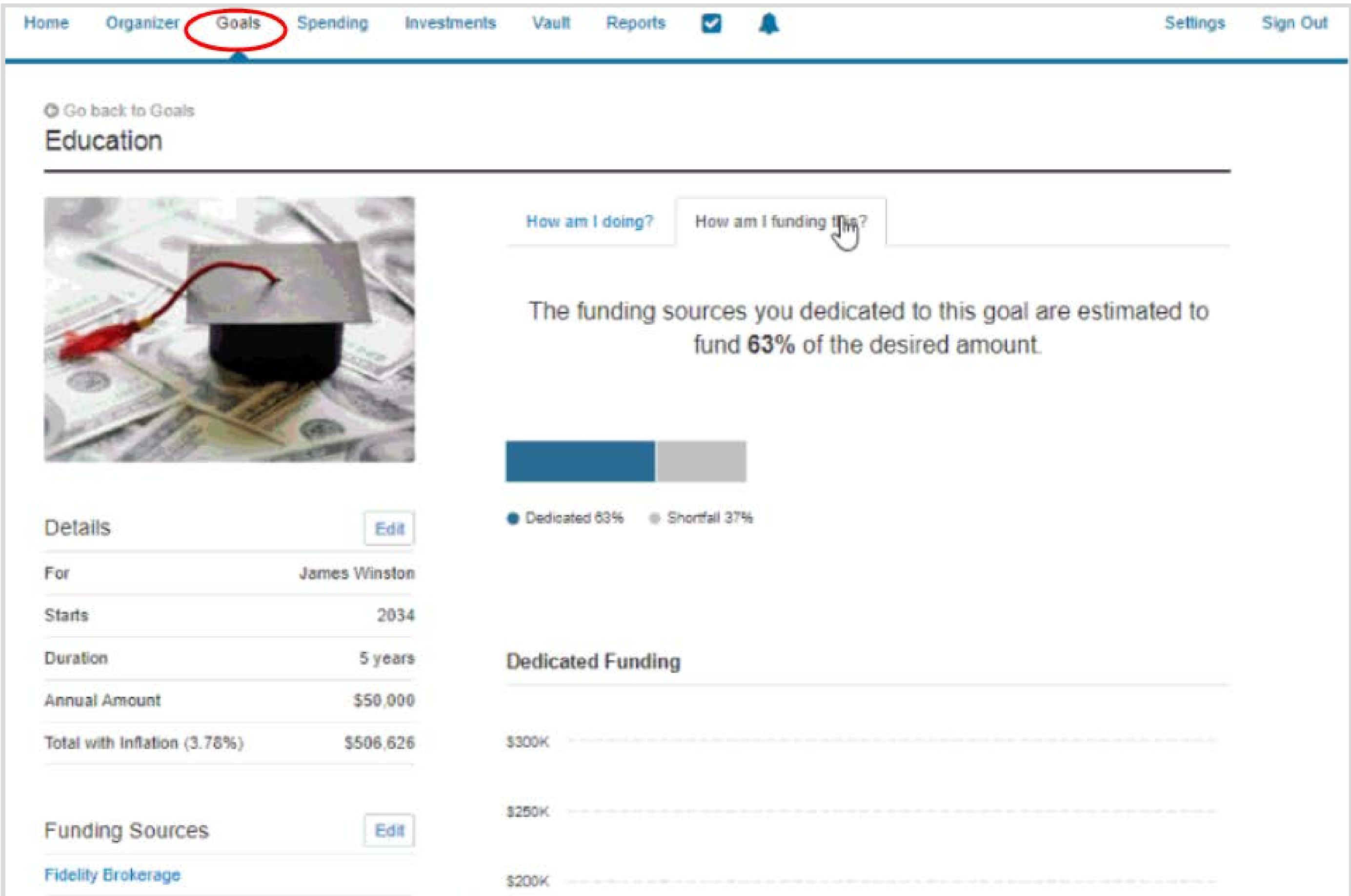


Begin customizing your experience by clicking the **gear** icon in your **Net Worth** and **Investments** tiles!

2. The **Organizer** will help you to consolidate all of your important financial information into one place. Click the different sections to add and edit the related information. Here you can add your accounts, financial data, people and property. The information included here will be used to populate other areas of the application, including the Home page.



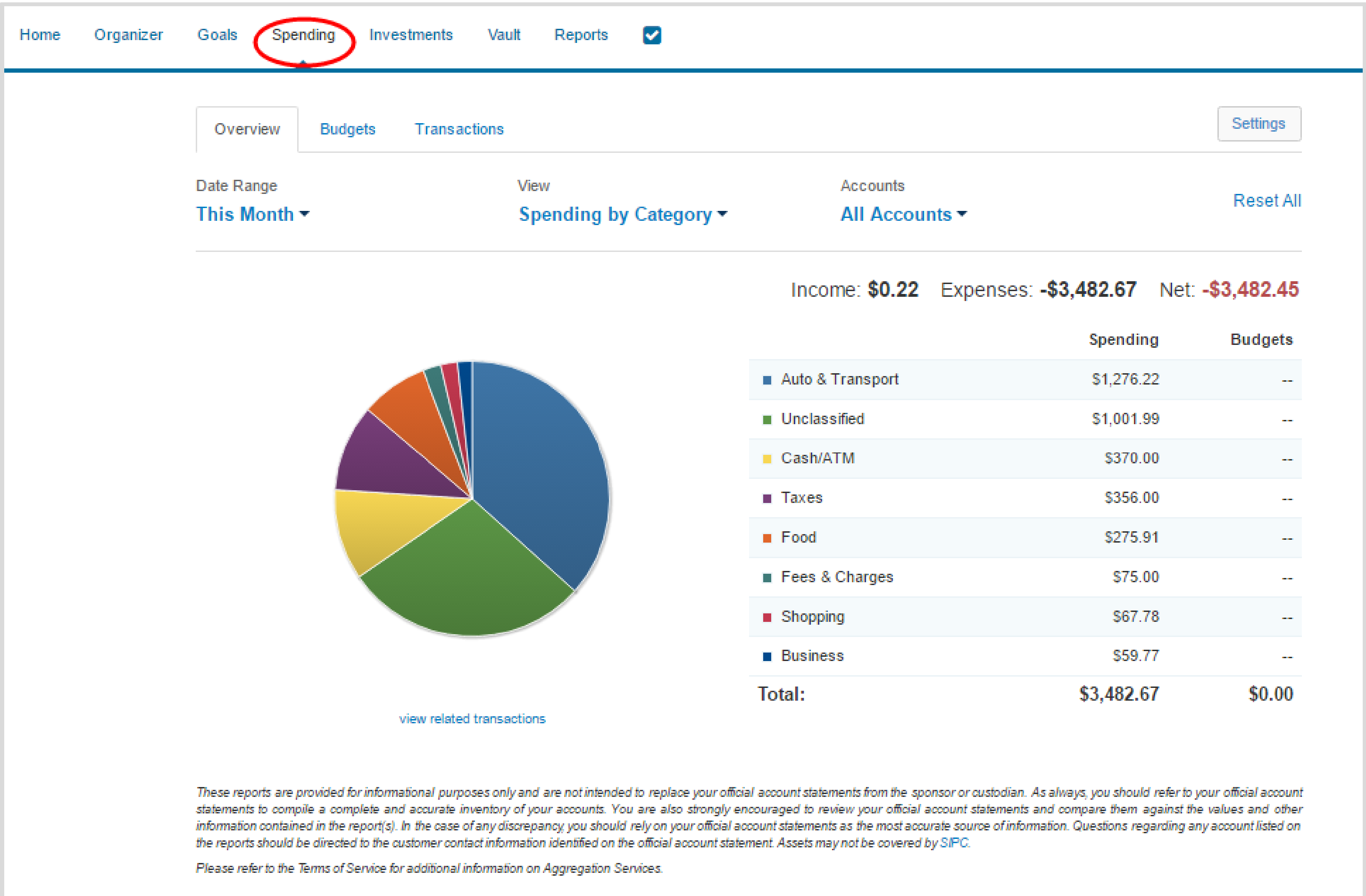
3. The **Goals** page allows you to see how your financial goals impact your holistic financial outlook. You can quickly drill into the details of each one of your goals for insight into projected coasts, funding, and suggested actions to improve your results!



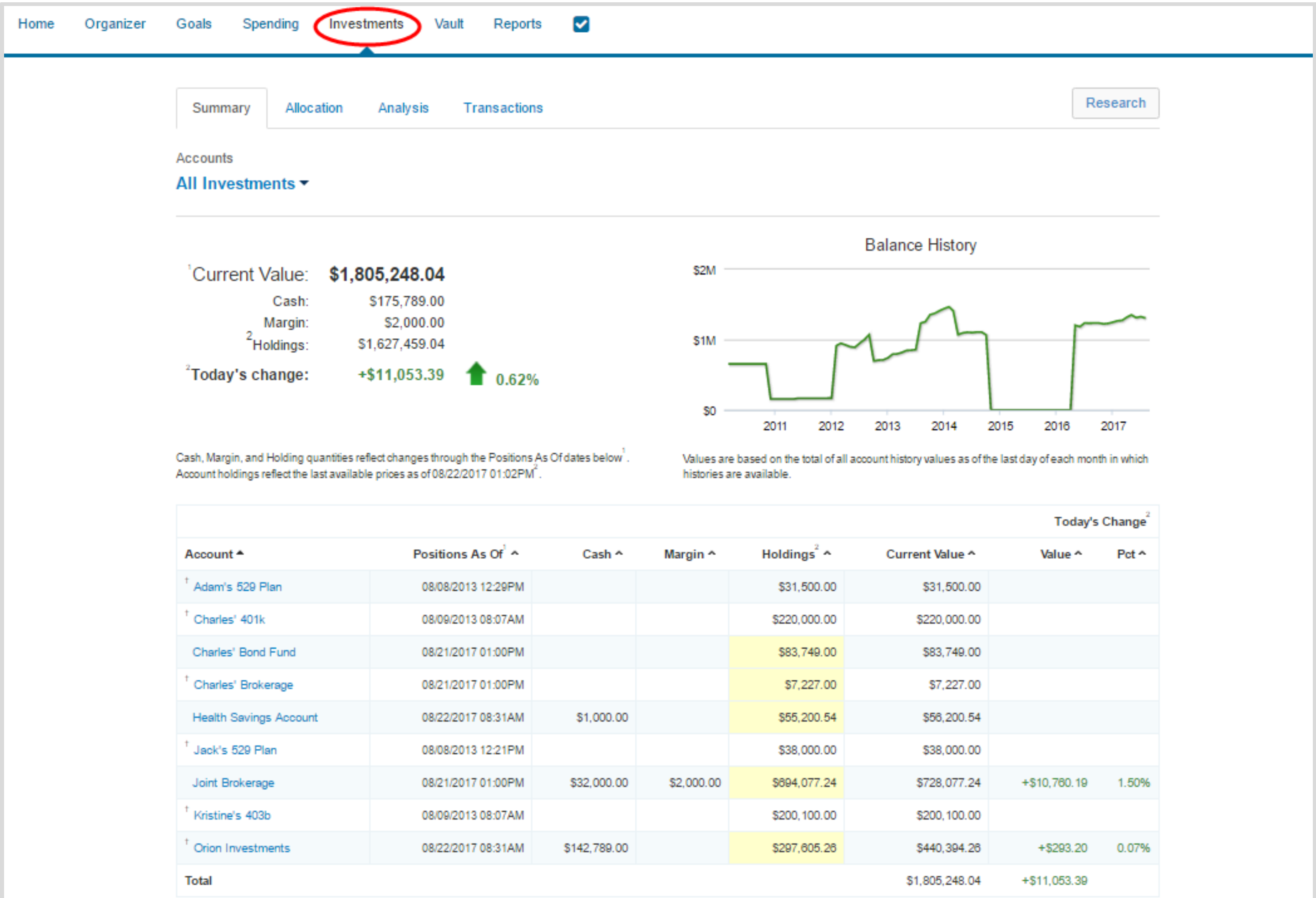
You can add the following goal types:

Education
Travel
Home Improvement
Wedding
Celebration
Elder Care
Retirement Home
Family Support
Alimony
New Car
Other

4. The **Spending** tab gives you a clear view of what you're spending each month. If there is no information on this screen, it's because a bank account or credit card needs to be added to **Accounts** in your **Organizer**. Spending includes an Overview, Budgets, and Transactions tab.

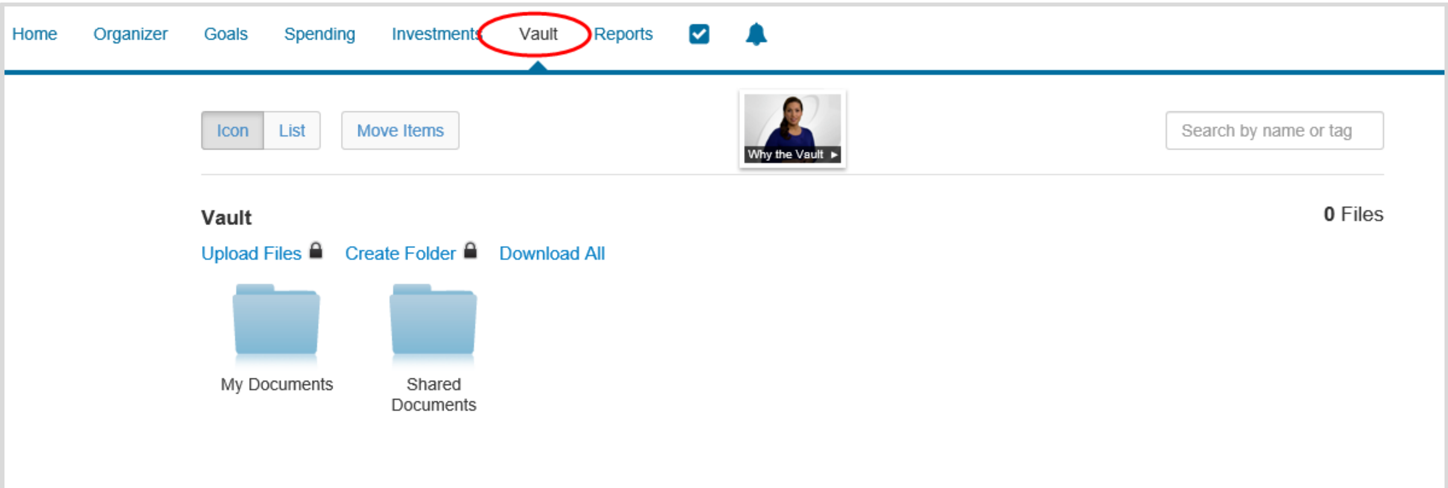


5. The **investments** tab is made up of four components: Summary, Allocation, Analysis, and Transactions. These will provide you with an overall view of your investments as well as the ability to drill into individual accounts & asset breakdowns.

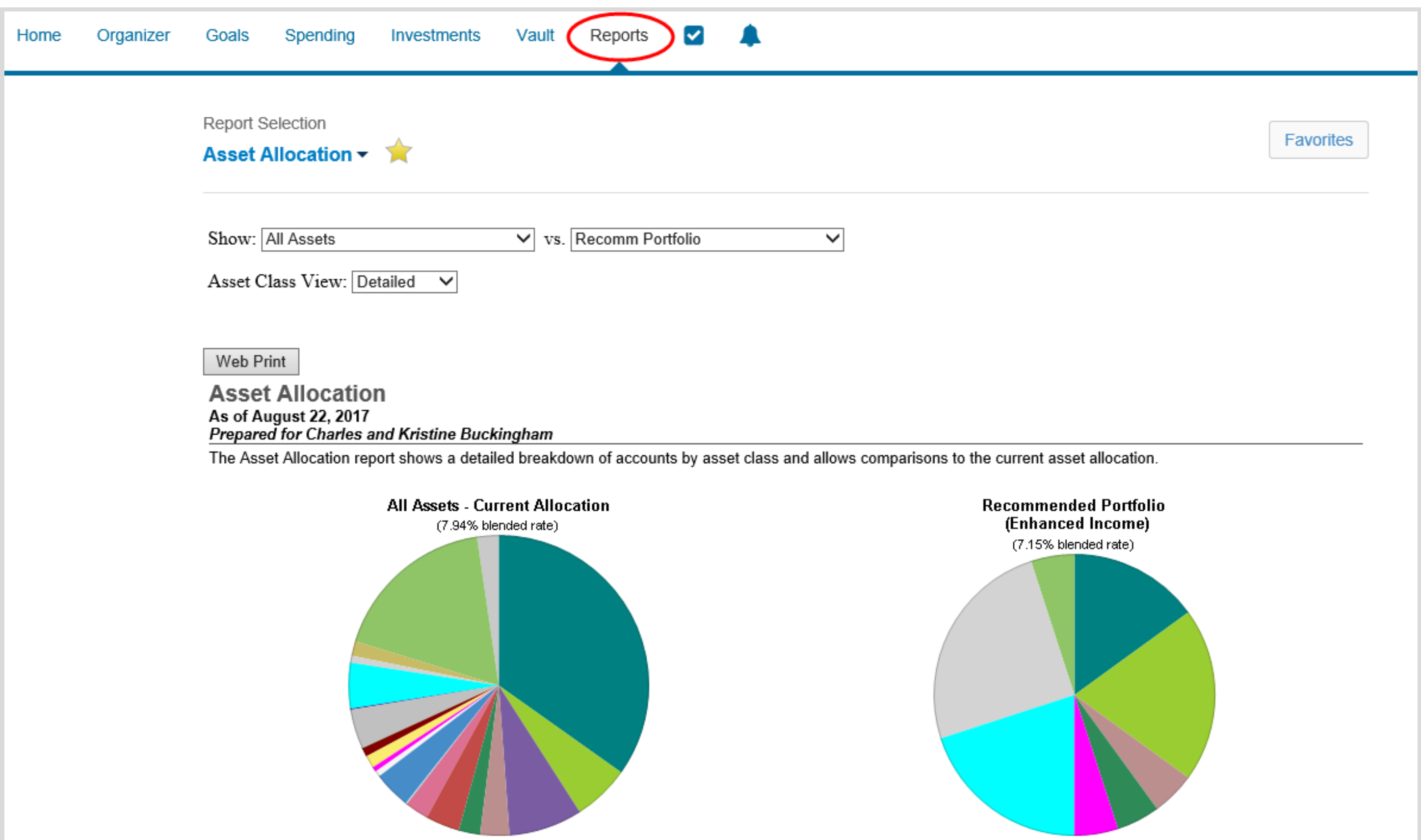


Account	Positions As Of	Cash	Margin	Holdings	Current Value	Today's Change Value	Today's Change Pct
Adam's 529 Plan	08/08/2013 12:29PM			$31,500.00	$31,500.00		
Charles' 401k	08/09/2013 08:07AM			$220,000.00	$220,000.00		
Charles' Bond Fund	08/21/2017 01:00PM			$83,749.00	$83,749.00		
Charles' Brokerage	08/21/2017 01:00PM			$7,227.00	$7,227.00		
Health Savings Account	08/22/2017 08:31AM	$1,000.00		$55,200.54	$56,200.54		
Jack's 529 Plan	08/08/2013 12:21PM			$38,000.00	$38,000.00		
Joint Brokerage	08/21/2017 01:00PM	$32,000.00	$2,000.00	$694,077.24	$728,077.24	+$10,760.19	1.50%
Kristine's 403b	08/09/2013 08:07AM			$200,100.00	$200,100.00		
Orion Investments	08/22/2017 08:31AM	$142,789.00		$297,605.26	$440,394.26	+$293.20	0.07%
Total					$1,805,248.04	+$11,053.39	

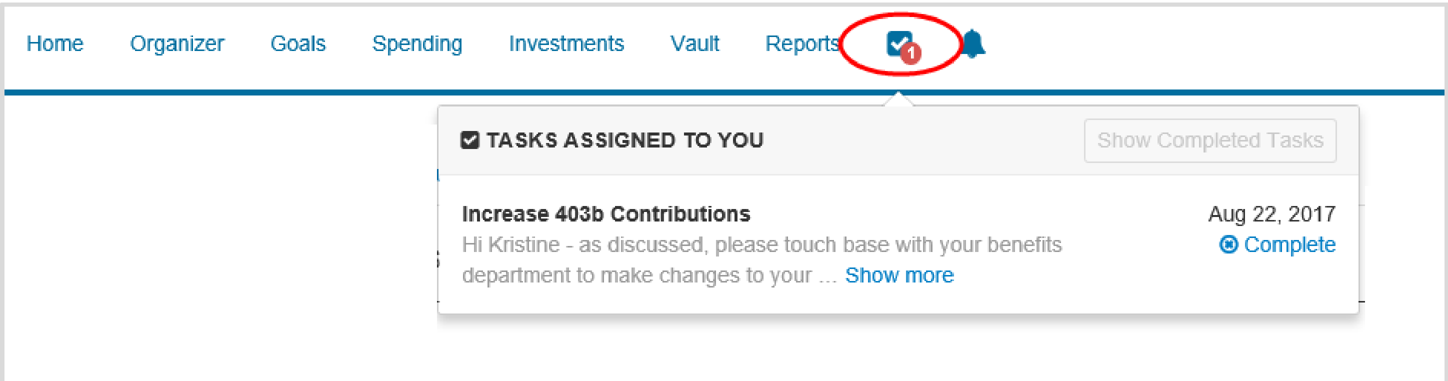
6. The **Vault** tab is a repository which files are stored by your advisor for your review, and where you can store files. To upload a file, click the **Upload Files** link. The **My Documents** folder is hidden from your advisor. If you want your advisor to see a document, upload into the **Shared Documents** folder.



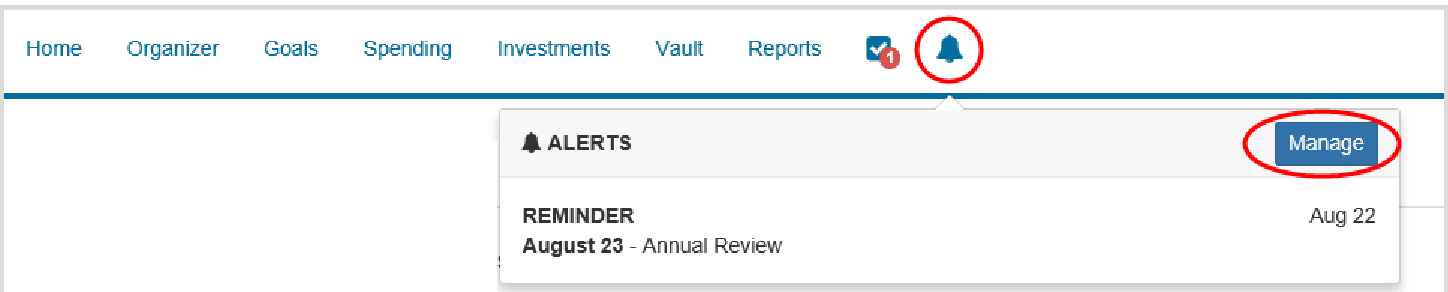
7. The **Reports** tab provides you with a series of reports about your financial situation.



8. The **Check Box** icon will alert you of any tasks assigned to you. Click the Complete link when you've finished the task to notify your Financial Representative.



9. The **Bell** icon allows you to view any triggered alerts. Click **Manage** to set up alert parameters!



10. The **Settings** page is where you manage alerts, update your security information (Passwords, 2-Factor Authentication & Security Questions), and permission your advisor to see spending information through the Privacy tab.