Client Mobile Site Overview

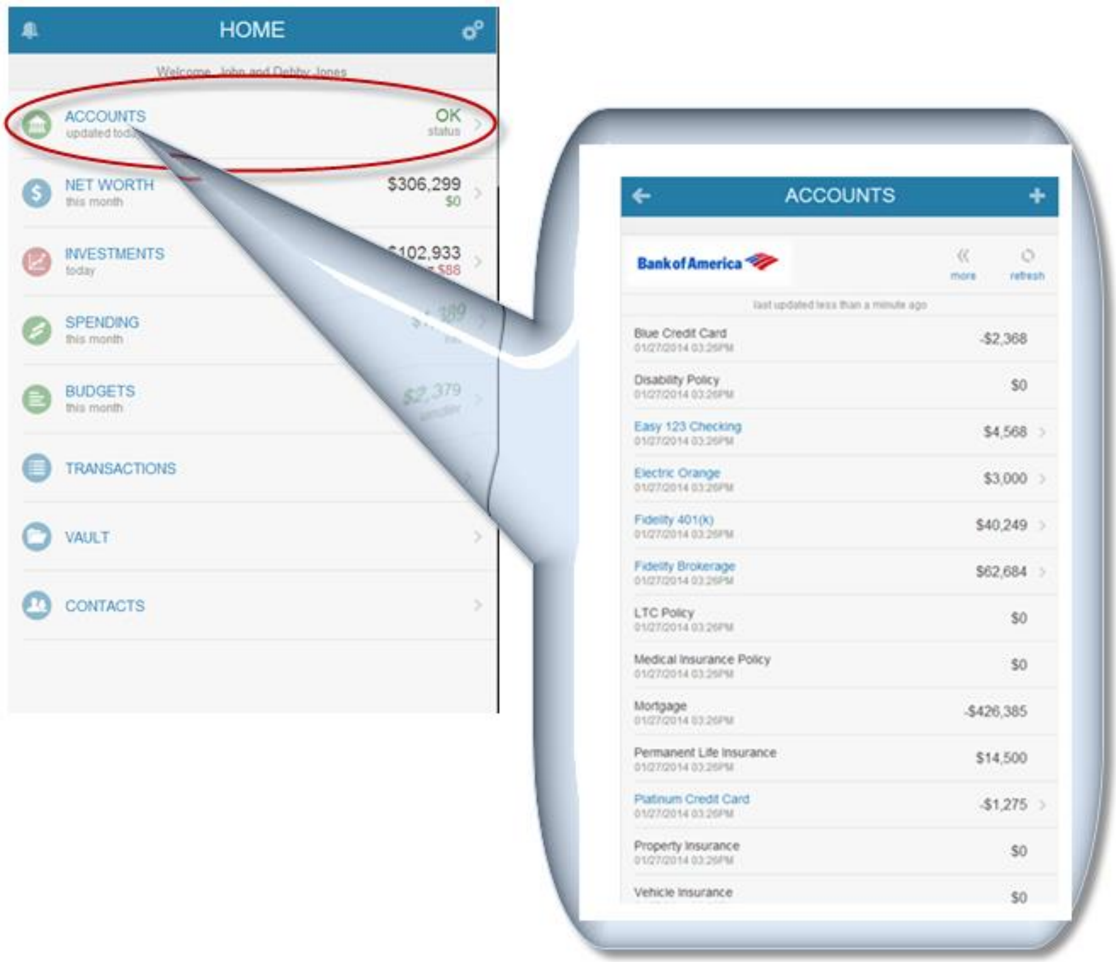
This training guide will demonstrate the Mobile Client Site. The Mobile Client Site is a consolidated view of your financial information in your personal financial website.

This guide will overview the following features: **Contacts**, **Accounts**, **Cash Flow**, **Budgeting**, **Transactions**, **Investments** and the **Vault**.

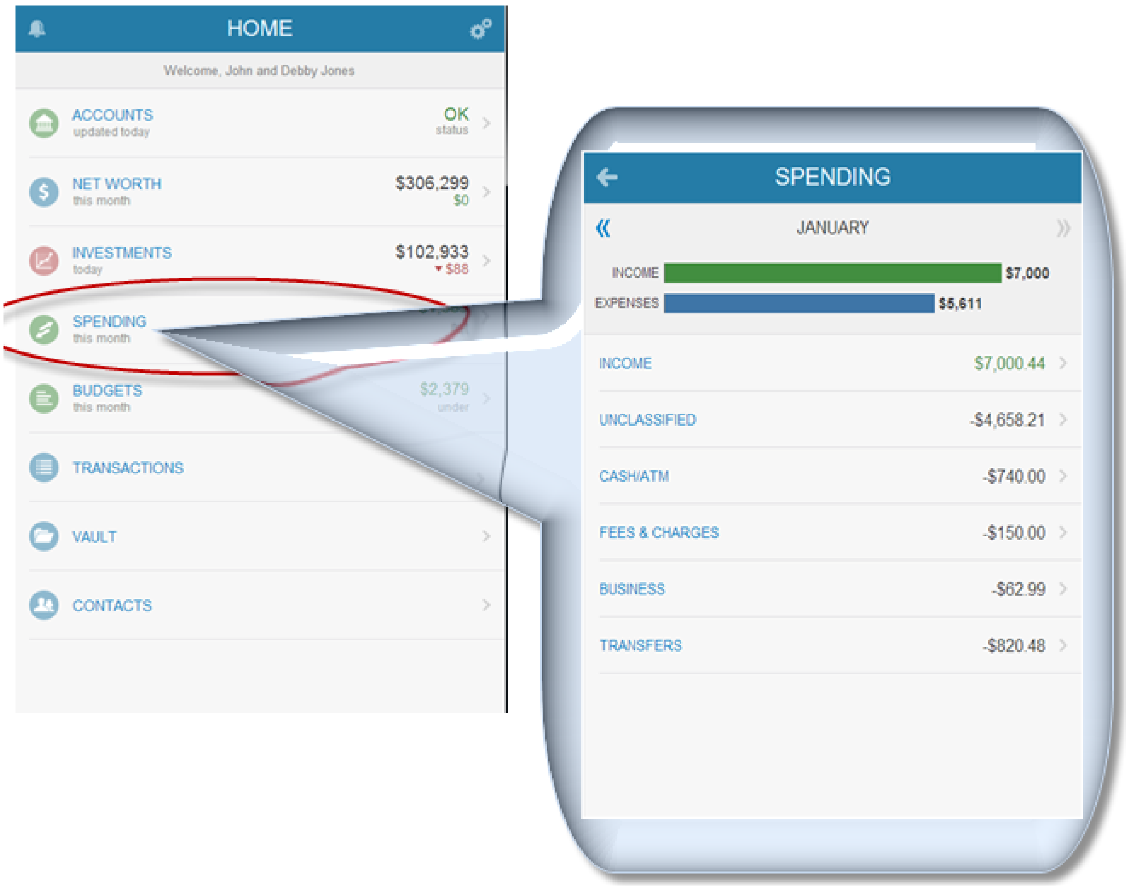
1. From your smart phone, click the mobile app and log in.

Please note: If you do not have the mobile app saved in your phone, please refer to the "Client Site- Branding Client Site to Mobile Phone" user guide.

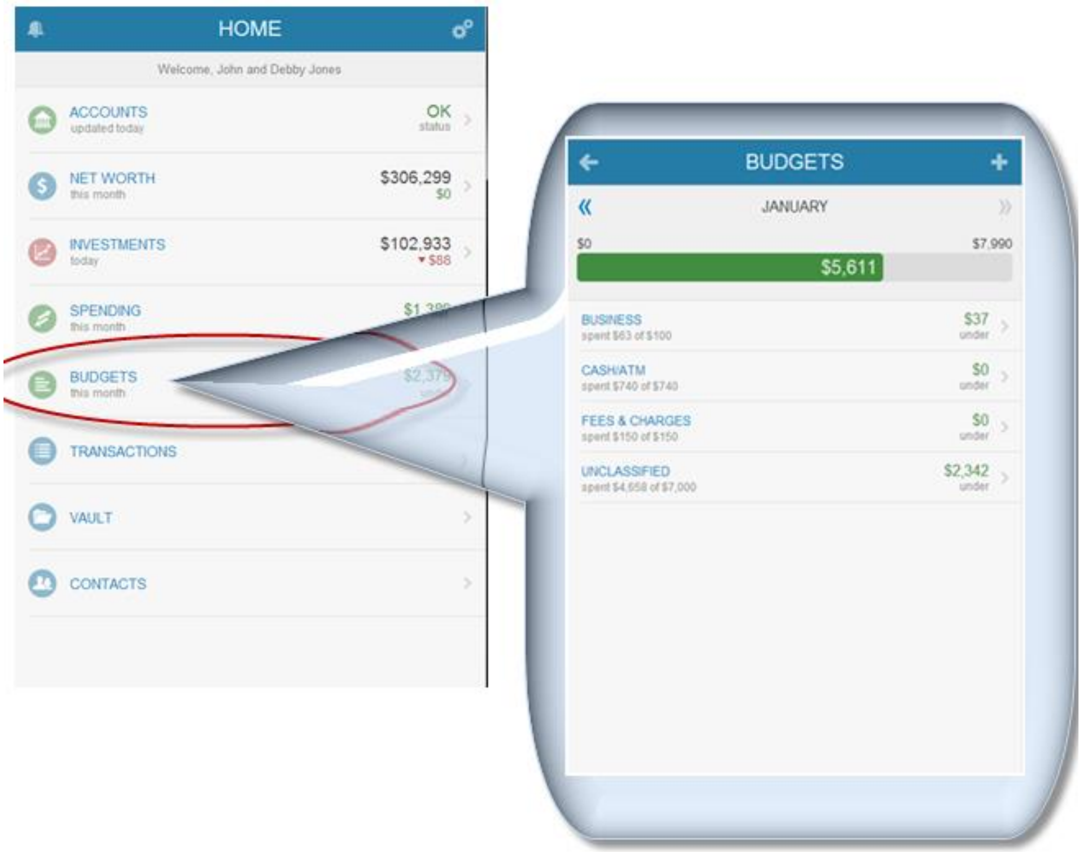
2. Tap the **Accounts** tab to view your latest account data.



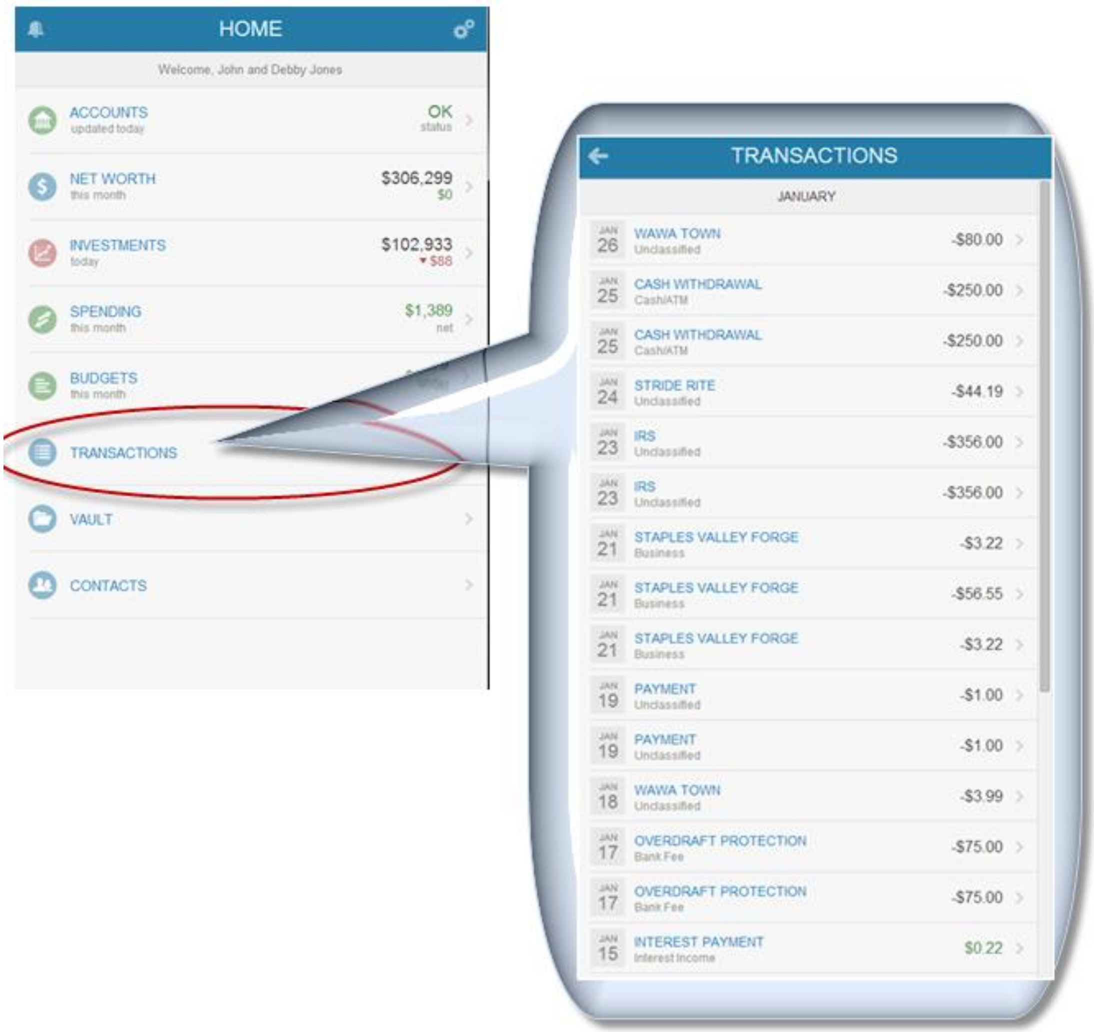
3. Tap the **Spending** tab to track your spending habits.
    a. Spending tab provides with your recent spending by category and month imported from connected accounts.



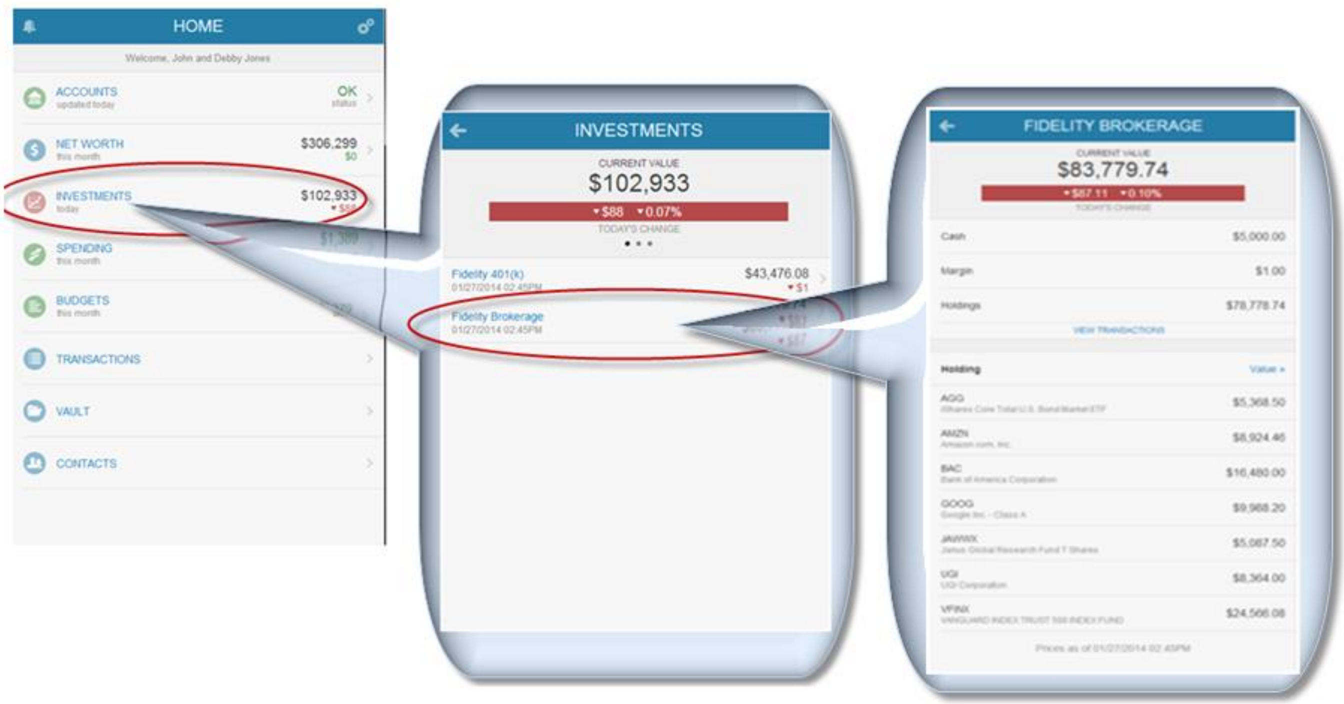
4. Tap the **Budget** tab to see a snapshot of your budget to monitor if you are on track.



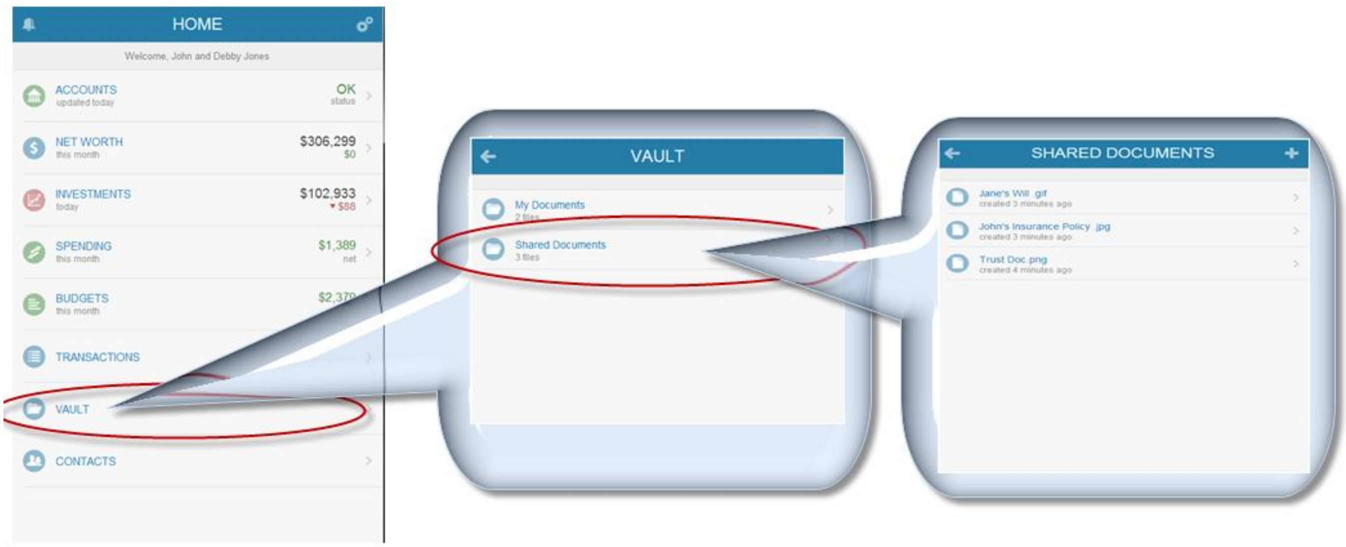
5. Tap **Transactions** tab to display your recent transactions details from your connected accounts.



6. The **Investments** tab allows you to view up to date market information based off of any connected investments.
7. Tap an account name to see a holdings break down of a given account.



8. Tap the **Vault** to view personal documents in electronic format.
    a. Tap **Shared Documents** to upload documents and allow your advisor to view the contents.
    b. Tap **My Documents** to upload documents into a private folder where only your access can view the contents.



Please note:
For more information on uploading into the mobile vault, refer to the
"Client Site- Client Facing How to Upload to the Vault from a Mobile Device" user guide.