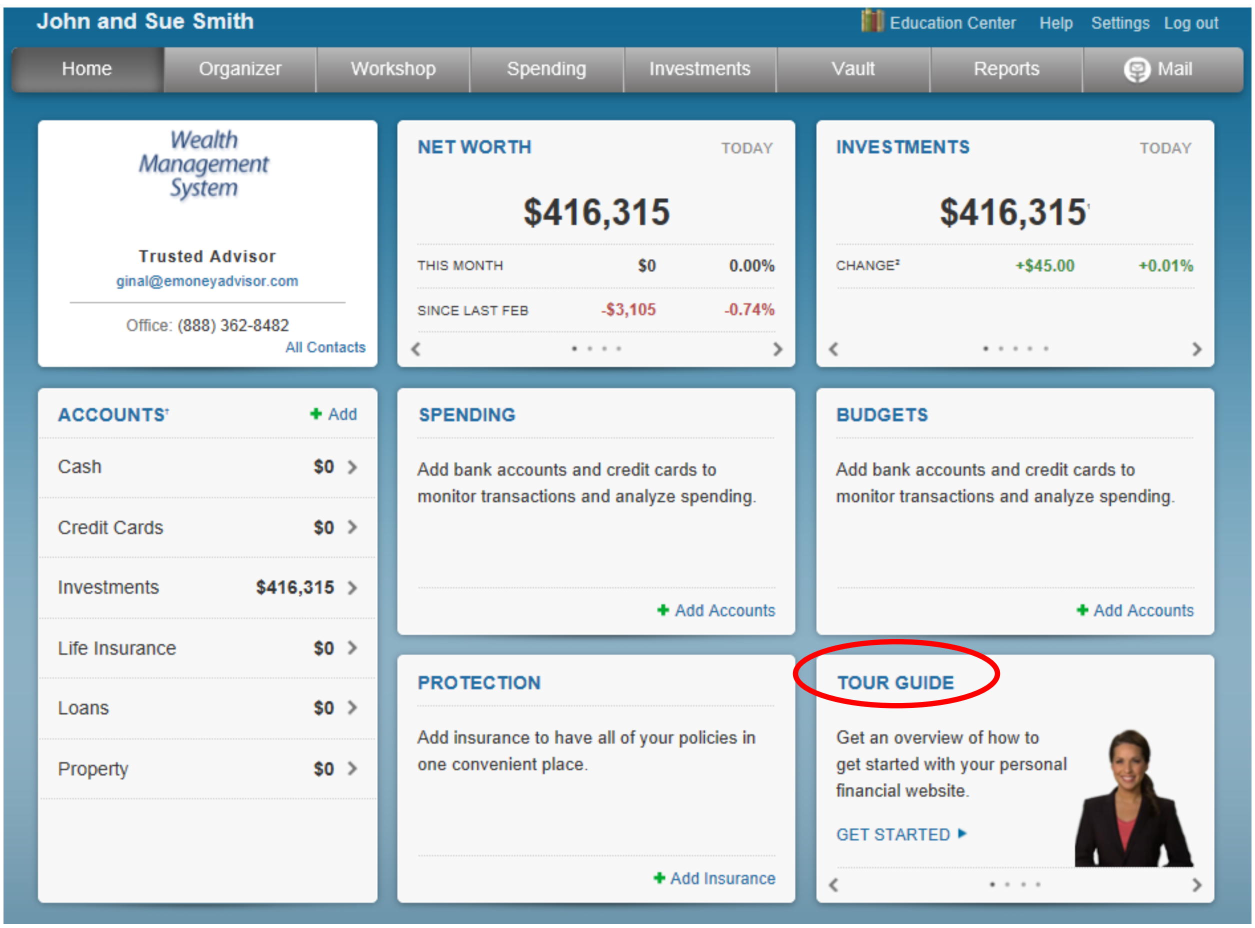
Client Website Overview

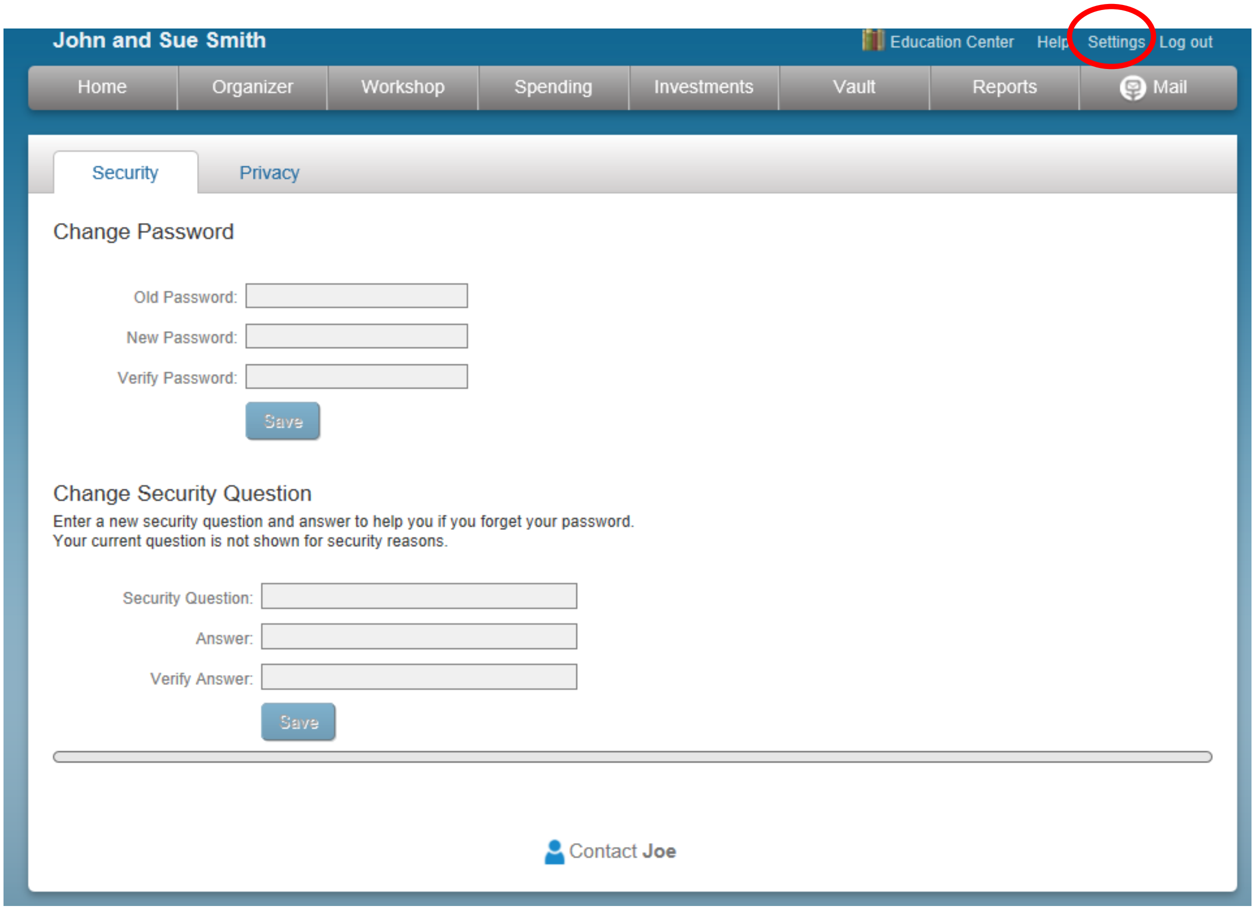
This training guide will demonstrate the **Client Website Overview**. Your Client Website is your own Personal Financial Website that will provide you with a consolidated view of your financial information.

There are many features such as the **Organizer**, **Workshops**, **Budgeting**, **Reports**, and the **Vault** (an online safe deposit box to store digital copies of valuable personal documents such as wills, trusts, passport information, photos, etc.).

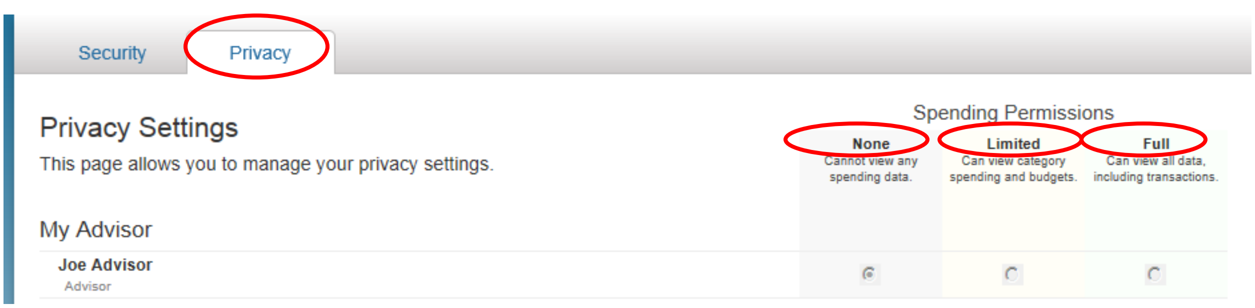
1. At the bottom right hand side of the **Home** page, click on the **Tour Guide** to take a tour through your client website.



2. You are able to set security & privacy **Settings**.



3. The **Privacy** tab allows you to control your Advisor's access.



None – your Advisor will not have access to any of your spending data.

Limited- your Advisor has limited access to your spending details and can view only the categories regarding the spending and budget:

Full access- your Advisor can view spending and budgeting items, including transactions.

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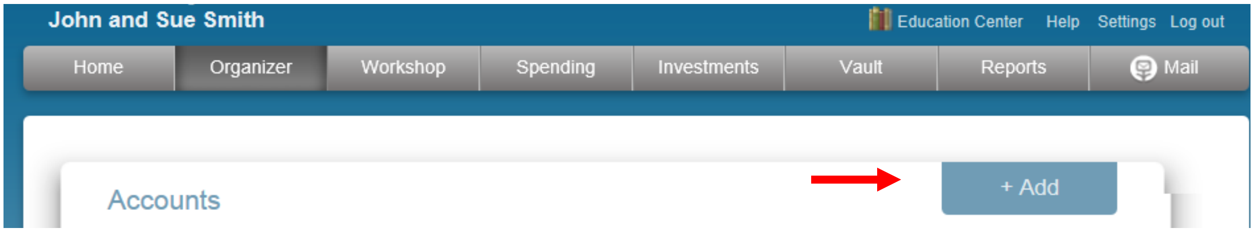
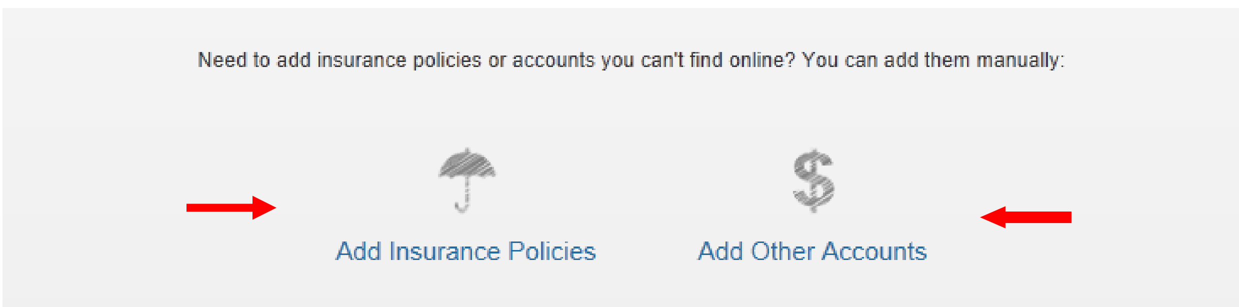
4. The **Organizer** tab gives you a place to enter your data, provided your Advisor has enabled this feature for you.

5. Click on Accounts and then click Add to search for an institution by name or website address.



Note: For more information on connecting accounts, see the Client Connections Booklet.

6. To **manually** enter data, select from the appropriate categories.



7. The **Workshops** tab allows you to analyze if you are saving enough for retirement or a college expense as well as analyze your life insurance needs. Follow the tour guide to walk you through these exercises.

8. The **Spending** tab allows you to track your spending habits and build a custom budget.

   a. The **Overview** tab provides a pie chart based off of recent transactions imported from aggregated accounts.
   b. The **Budget** window is a snapshot that allows you to monitor if you are on track with your monthly budget.

Note: For detailed information on how the budgeting & transaction features work, please refer to the Client Site Budgeting Tool user guide.

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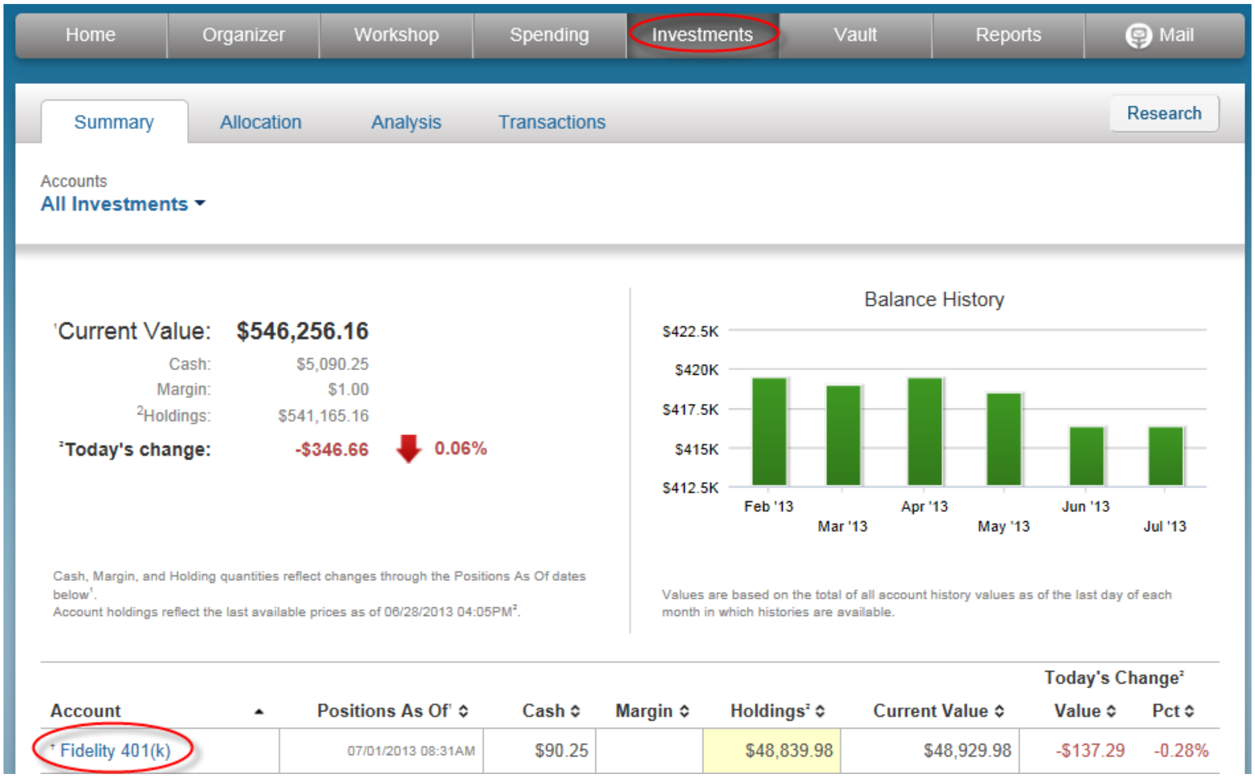
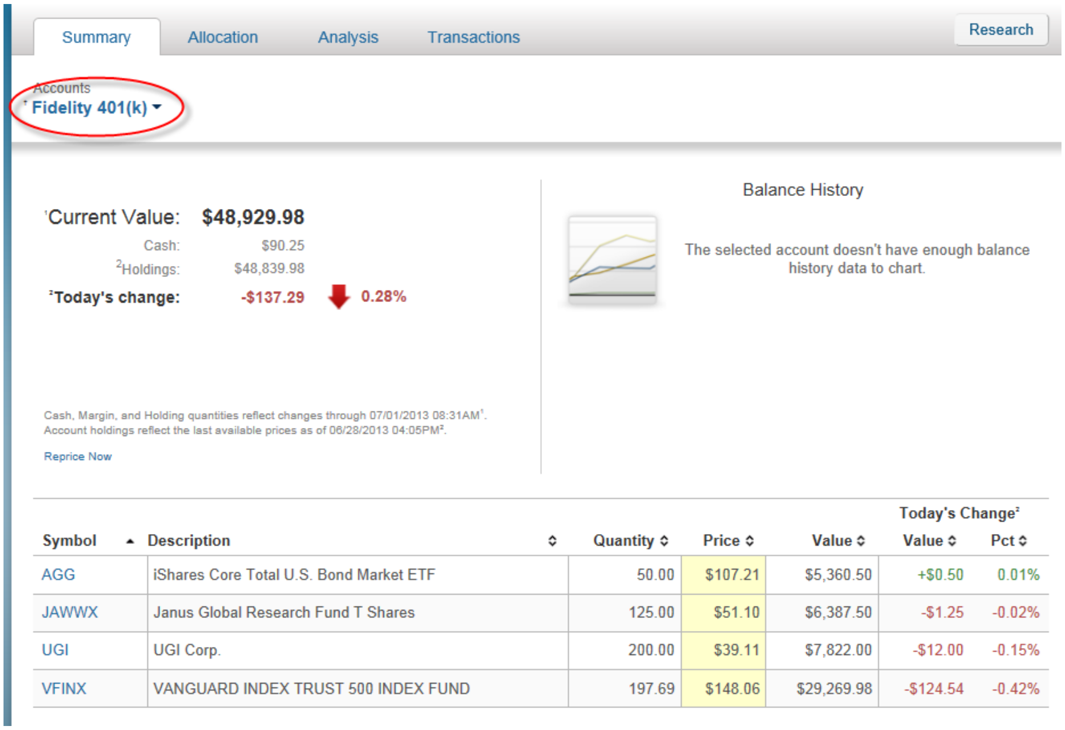
9. The **Investments** tab allows you to view up to date market information based off of any connected investments.



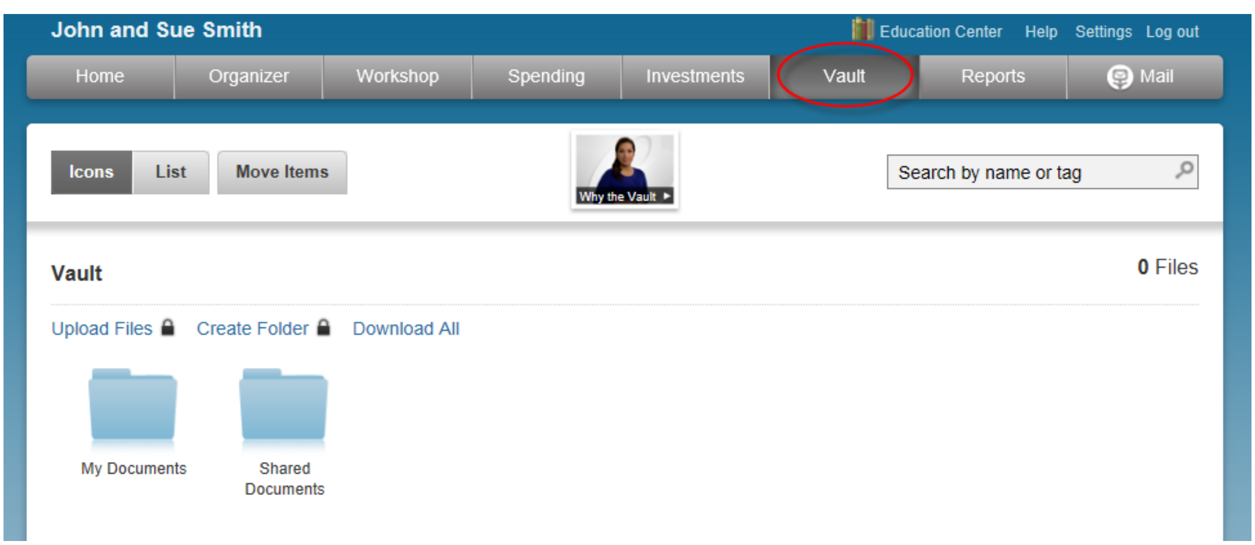
10. Click on the **Account Name** to see a holdings break down of a given account.



11. The **Vault** provides secure storage for valuable personal documents (**wills, trusts, insurance documents, passports, etc.**) in electronic format.

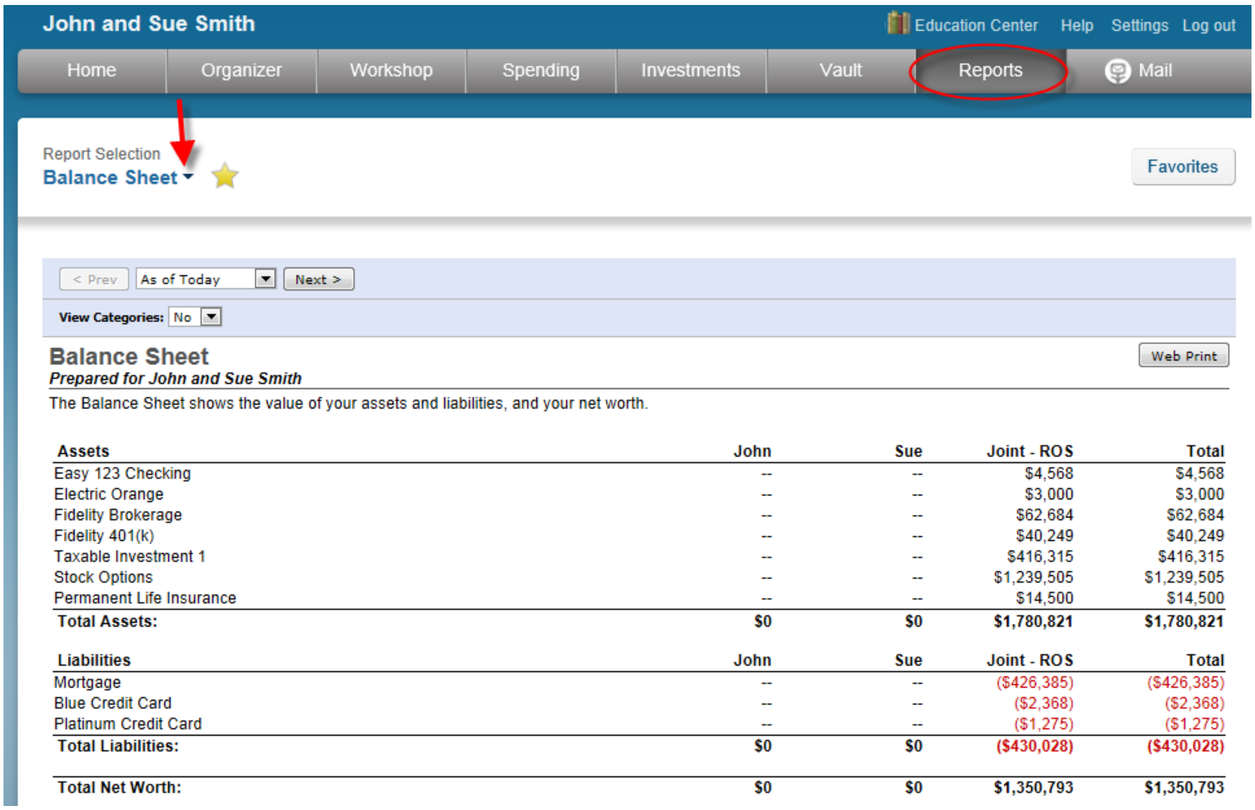
    a. You can upload documents into the **Shared Documents** folder allowing the advisor to also view the contents.

    b. You can upload documents into the **My Documents** folder which is a private folder where only *your access* can view the contents.



Note: The Vault allows you to store files of the following types: aifc, aiff, aif, au, avi, bmp, doc, gif, jpg, jpeg, mov, mp3, mpeg, mpg, pdf, png, ppt, ps, rtf, snd, swf, tax, tif, tiff, txt, wav, wma, wmv, wps, xls, and xml.

12. The **Reports** tab provides you with a series of statements about your financial situation. To view a report, simply choose from the drop down list located under Report Selection.



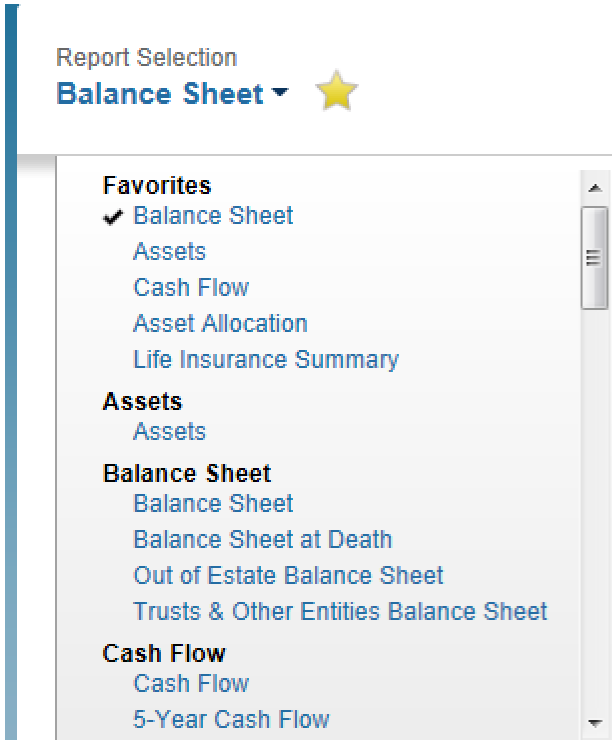
Balance Sheet

Prepared for John and Sue Smith

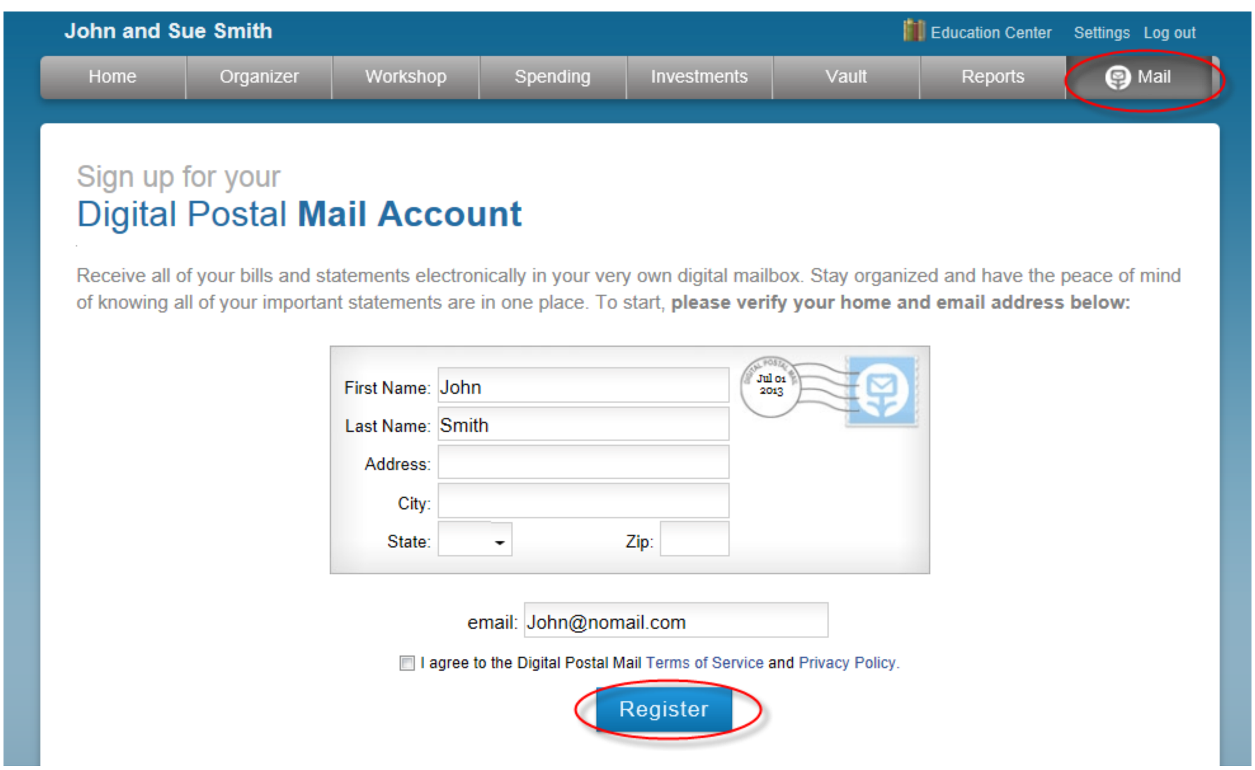
The Balance Sheet shows the value of your assets and liabilities, and your net worth.

Assets	John	Sue	Joint - ROS	Total
Easy 123 Checking	--	--	$4,568	$4,568
Electric Orange	--	--	$3,000	$3,000
Fidelity Brokerage	--	--	$62,684	$62,684
Fidelity 401(k)	--	--	$40,249	$40,249
Taxable Investment 1	--	--	$416,315	$416,315
Stock Options	--	--	$1,239,505	$1,239,505
Permanent Life Insurance	--	--	$14,500	$14,500
Total Assets:	**$0**	**$0**	**$1,780,821**	**$1,780,821**

Liabilities	John	Sue	Joint - ROS	Total
Mortgage	--	--	($426,385)	($426,385)
Blue Credit Card	--	--	($2,368)	($2,368)
Platinum Credit Card	--	--	($1,275)	($1,275)
Total Liabilities:	**$0**	**$0**	**($430,028)**	**($430,028)**
Total Net Worth:	**$0**	**$0**	**$1,350,793**	**$1,350,793**



13. The **Mail** tab allows you to sign up for **Digital Postal Mail**, where you can receive your bills and statements electronically. Click **Register** to get started.



Note: For more information, please refer to the Digital Postal Mail Booklet and Digital Postal Mail FAQ document.

14. The **Awards** tab is a free service that allows you to track Frequent Flyer miles, Hotel Award points, Credit Card Awards, and other points programs.
    a. By signing up for access you can track your awards on the web. You can also receive statements & alerts via-email.
    b. To enroll, go to the Home page and scroll through the tiles at the bottom right side of page until you see **AWARDS.** Click **GO TO AWARDS.**

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