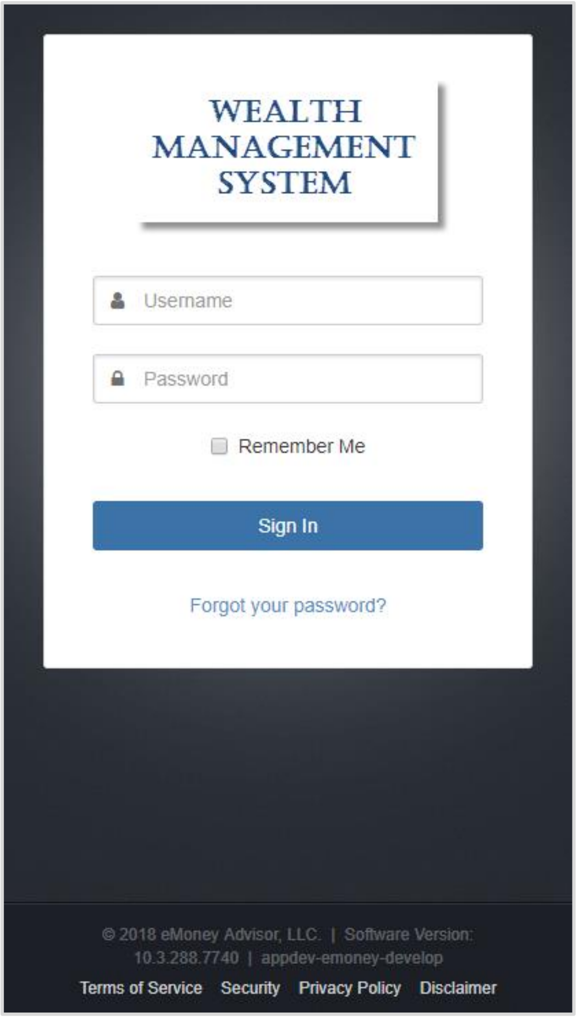
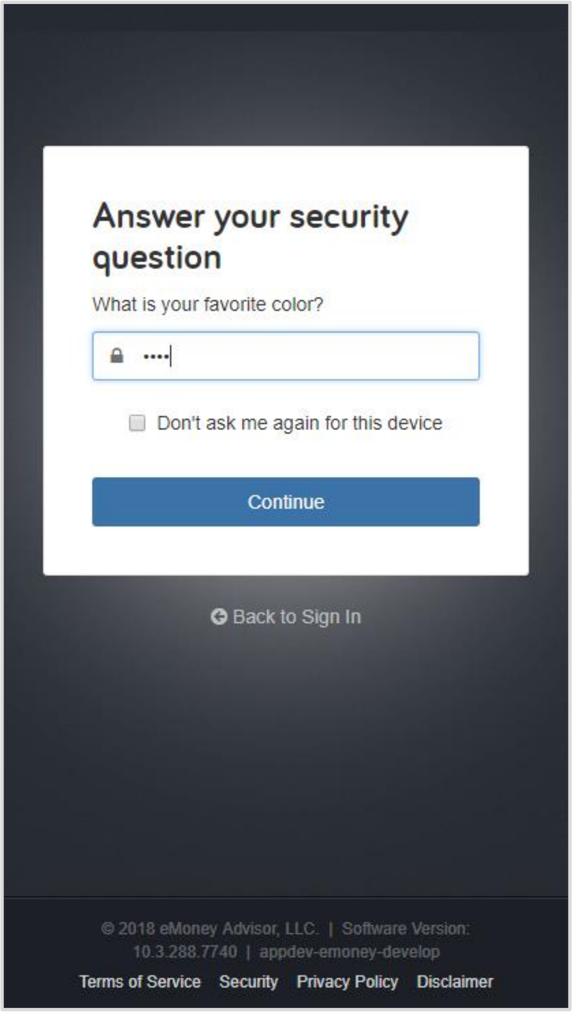
Comprehensive Mobile Guide

This training guide demonstrates the functionality of the Mobile version of your Personal Financial Website. The Mobile Site includes the same features from the desktop version, including a consolidated view of your information!

Access your site by using your normal login URL. You can refer to the confirmation email sent to you when you first registered your access.

Enter in your credentials & click Sign In. Next you may be prompted with a security challenge or to enter in a 4+digit passcode if you previously set one up. Security Questions & Passcodes are managed from the Security settings outlined later in this guide.





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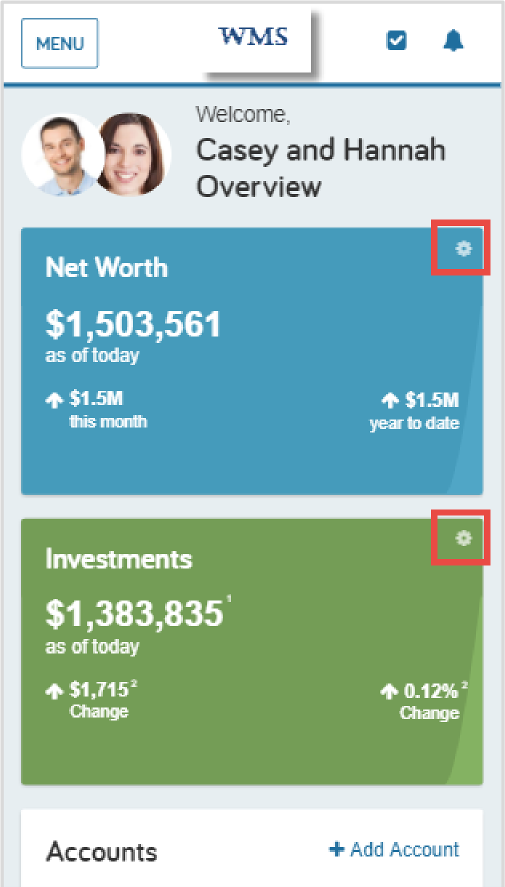
Once successfully authenticated, you will be on your Home page which consolidates all of the data we've entered into your website so far. Each section is populated from a specific feature on your website.

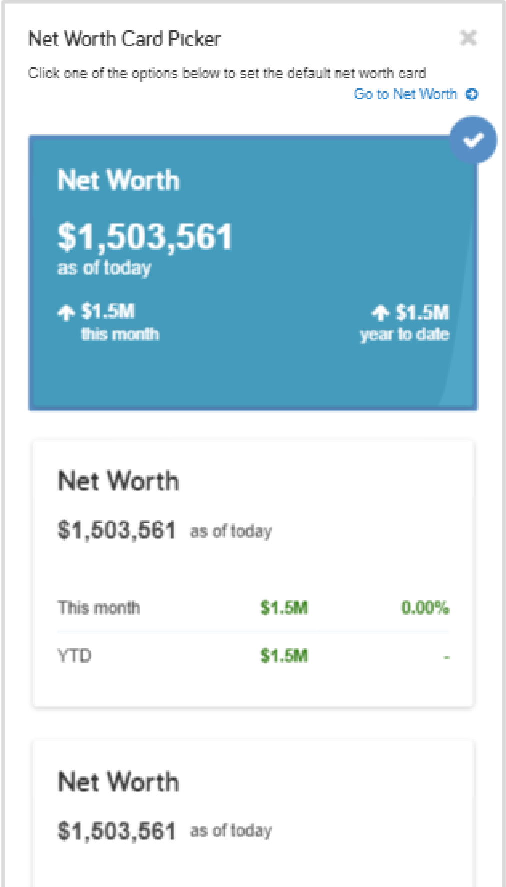
We will dive into each feature from the **MENU** drop down; Use the links below for quick access to a specific page.

Home Organizer Spending Investments Goals Vault Reports Settings

Home

Beginning with the Net Worth and Investments cards, the website allows you customize your experience. Click the gear icon in each card to pick your preferred view.





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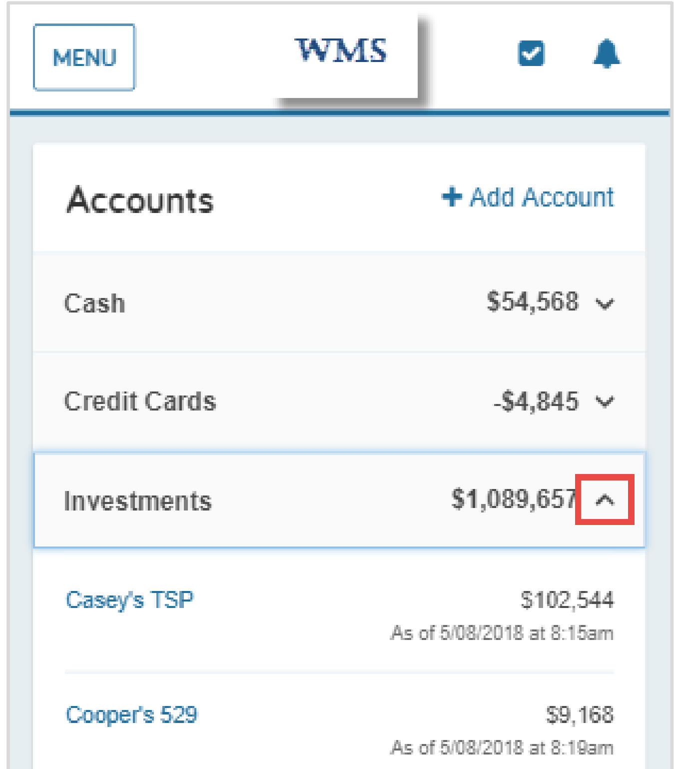
Home- Continued

Scrolling down the home screen you will see all of your **Accounts** organized into categories.

Click the down arrow on a category to see the expanded view of all accounts within that specific category.

Are you missing any accounts? Click **+Add Account** to connect any of your missing accounts. We will explain that process in more detail in the Organizer section of this guide.

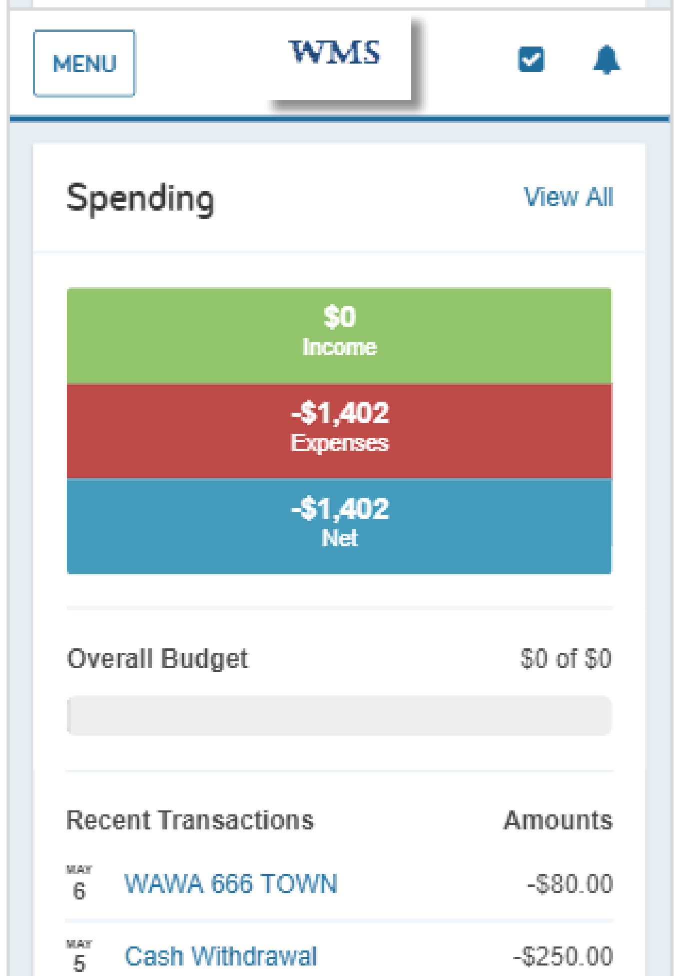


Below Accounts is all of your **Spending** data.

After you have connected your banking accounts (checking accounts & credit cards), your transactions will pull over to populate the Spending section of your website.

Below your spending summary and overall budget, you'll see an itemized list of transactions. These transactions report directly from your banking institutions.

Spending & Budgeting is a great place to begin tracking all of your spending in one place!



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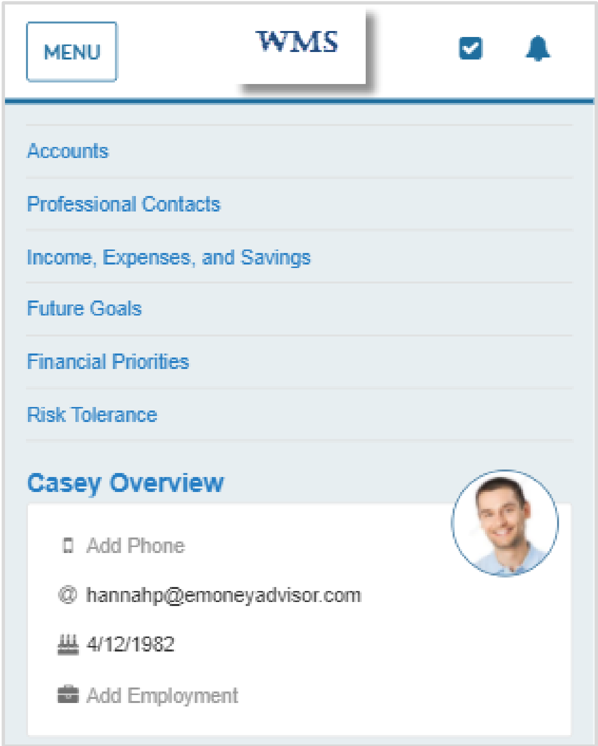
Organizer



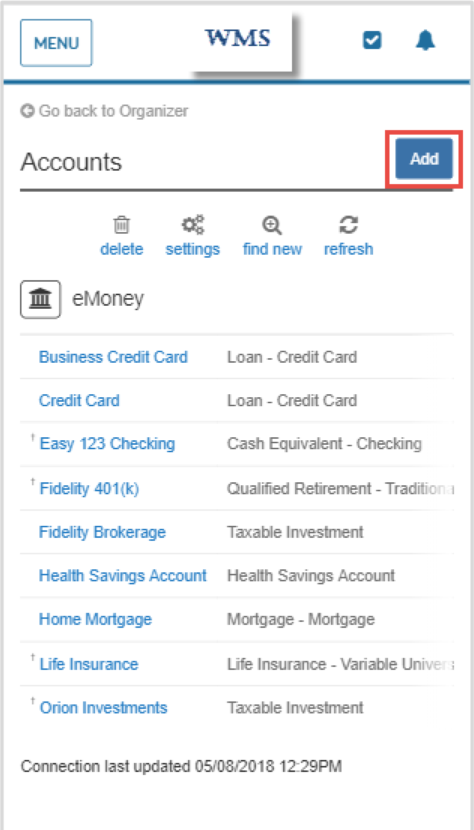
The **Organizer** is where you can view and modify your data. Key areas include: family & contact information, property, accounts, income, expenses, savings, and future goals.

Personalize your site by uploading profile pictures. Simply click your name to navigate to your contact information and upload from your desktop!

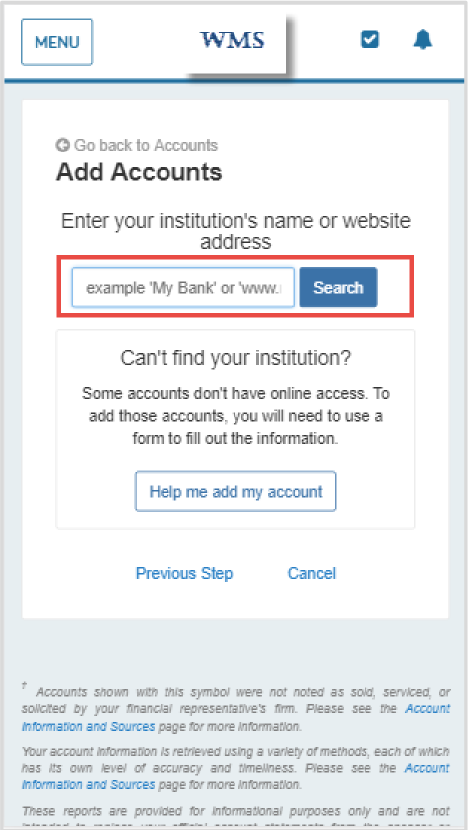
Add Accounts:

1. Click into the **Accounts** page of the Organizer.
2. At the top right of the Accounts page, click **Add**.
3. Continue the Add Account workflow which includes searching for the financial institution, entering your credentials to that system, as well as answer any security prompts. If the information provided was authenticated by the institution, your accounts will pull over.

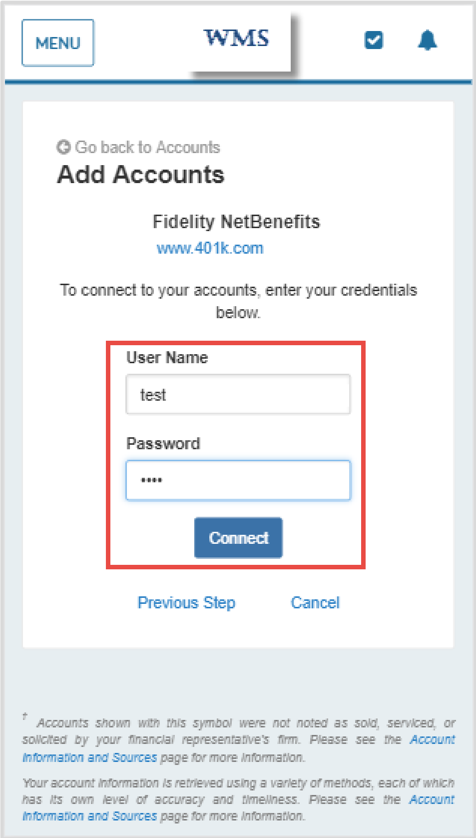
Click Add



Search Institution



Credentials & Connect!



After your credentials are successfully authenticated, your accounts will populate into your Organizer!

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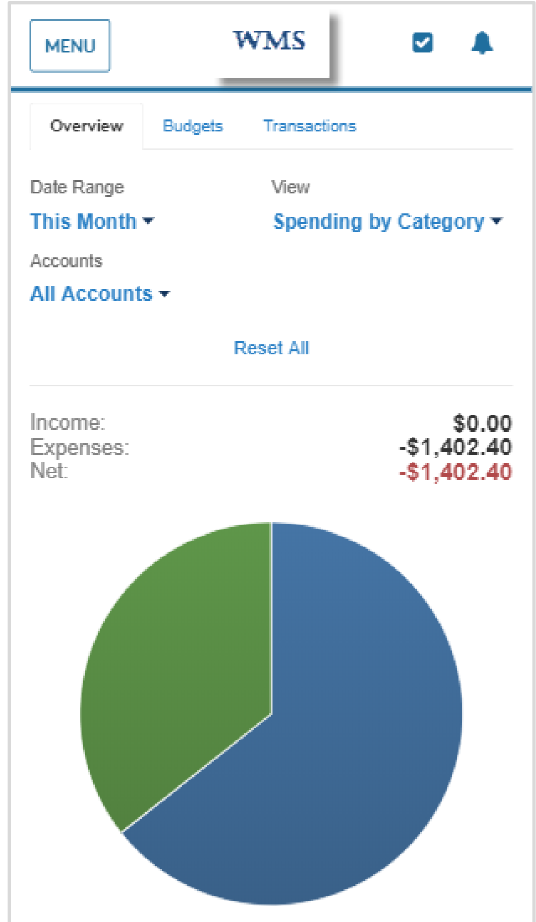
Spending



The **Spending** page is where you can track and monitor your spending by setting up budgets. To use spending, be sure to have connected your banking accounts in the Organizer!

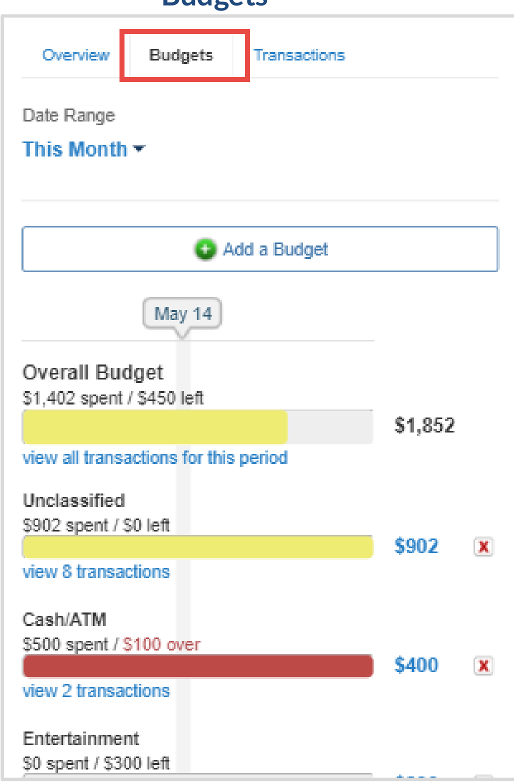
The Overview tab includes a pie chart of your spending by category.

On your spending overview you have the ability to customize a specific date range, view all or an individual account's spending, as well as view different charts by selecting the View drop down.

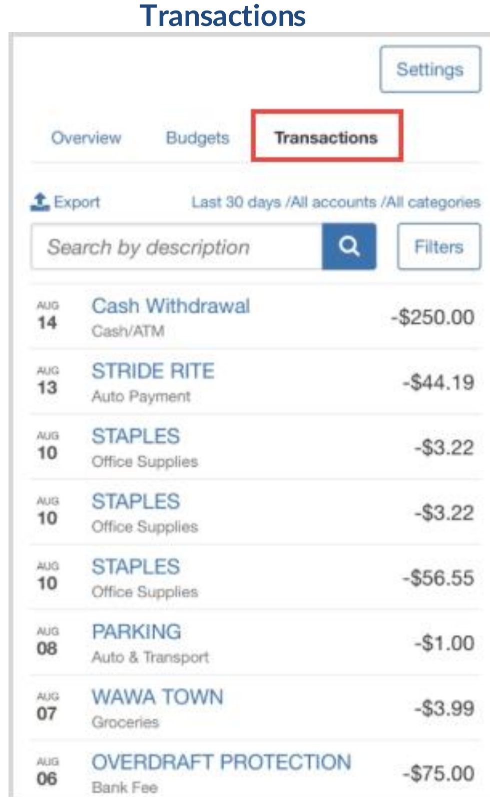
This feature is a great way to stay on top of your income and expenses! The values update with each connection refresh.

Across the top of this page there are two additional tabs within spending: **Budgets** & **Transactions**. With your Budgets it is important to note that the limits are for monthly spending. Do not use annual figures to build out the budget tracker! Transactions will feed over with the nightly account refresh from your financial institutions. The information in these tabs is what is used to populate your overview.

Budgets



Transactions



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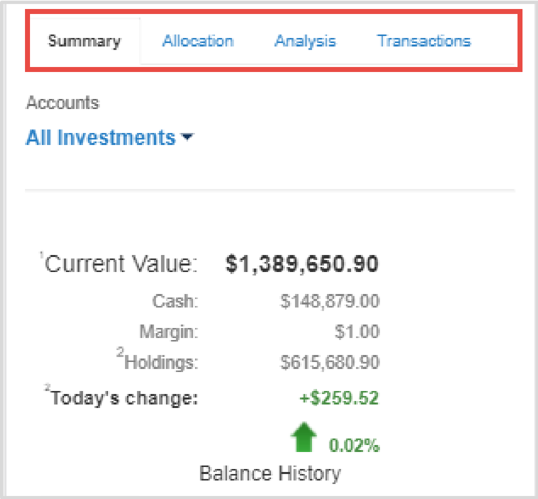
Investments

The **Investments** page reviews your account balance history, allocation, and transactions. Any accounts that have been connected from institution will update every 24 hours with up-to-date holdings information.

Use this feature to look at an overall picture of your investable assets, or drill in to an investment to isolate its holdings.

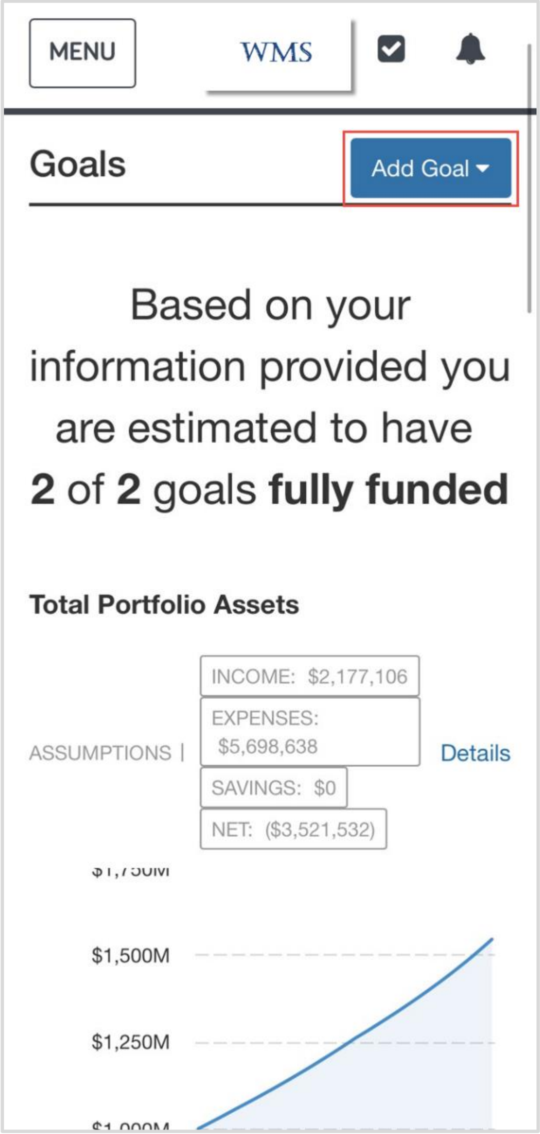
The allocation tab will populate how you are allocated overall or in a particular investment, while the analysis tab provides an insightful chart with the net change in total value since you added an account.



Goals

Goals allow you to track funding towards important financial expenses! Use this area to create a new goal by clicking the Add Goal button, or to track existing goals by scrolling down.

Each goal can be individually analyzed, but the landing screen will give a great view of everything all in one place!



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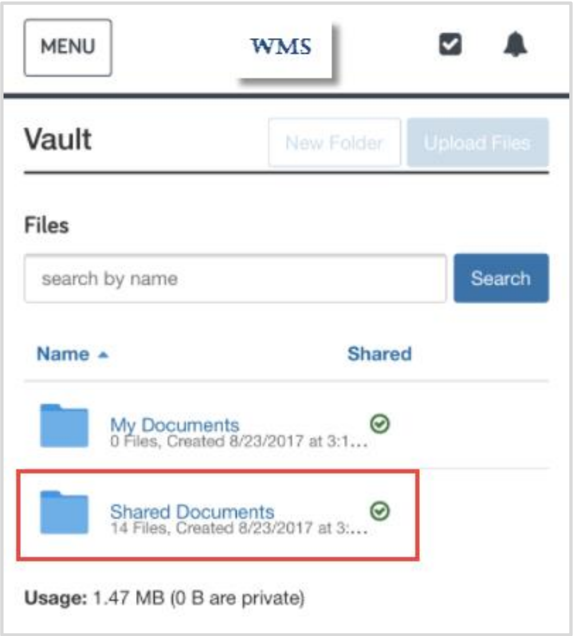
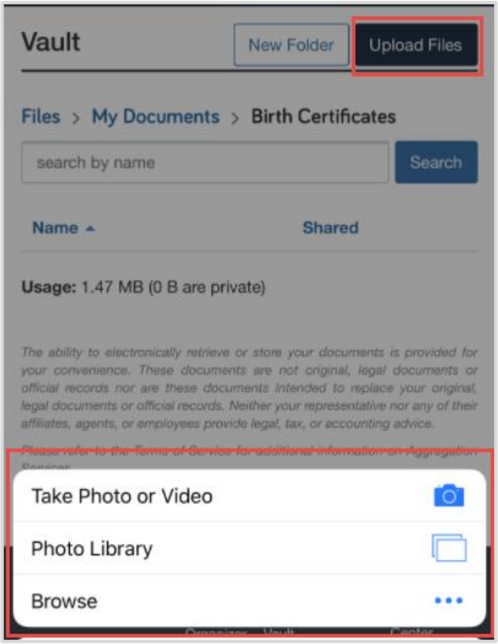
Vault

Your Vault is where you can access all previously uploaded files as well as upload new files. To upload a file, click in to either the **My Documents or Shared Documents** folder.

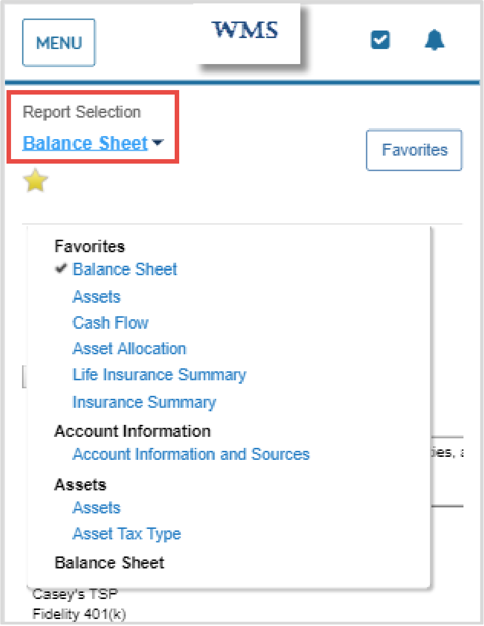
Next, click the **Upload File**s button. You will have the option to Take Photo or Video from your phone's camera, or choose from your Photo Library. Taking a Photo using your camera will save directly into the Vault and not in your device storage.





Reports

Use the Reports page to see more information about your investments and portfolio. Click the Report Selection drop down to see all of the available reports.



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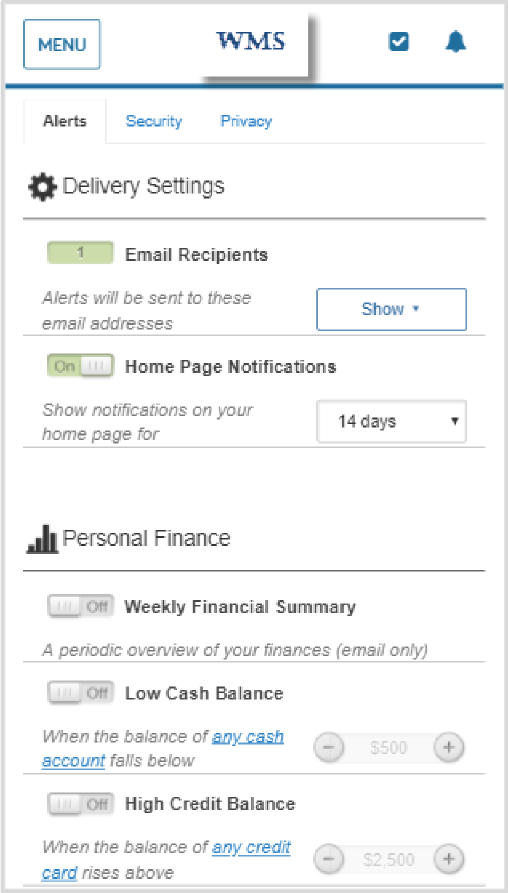
Settings



The **Settings** page allows you to set up Alerts & Notifications, manage your Security, and review your Spending Privacy Permissions.

On the **Alerts** tab, be sure to enabled email recipients – that way you will get an email when an alert has been triggered. You will also be notified upon log on, by the bell icon on the top of the application.

Use the **Security** tab to set up and manage your mobile Passcode. You are also able to update your password and change your security questions.

The **Privacy** tab will allow you to see and manage who has permission to see your Personal Financial Website.