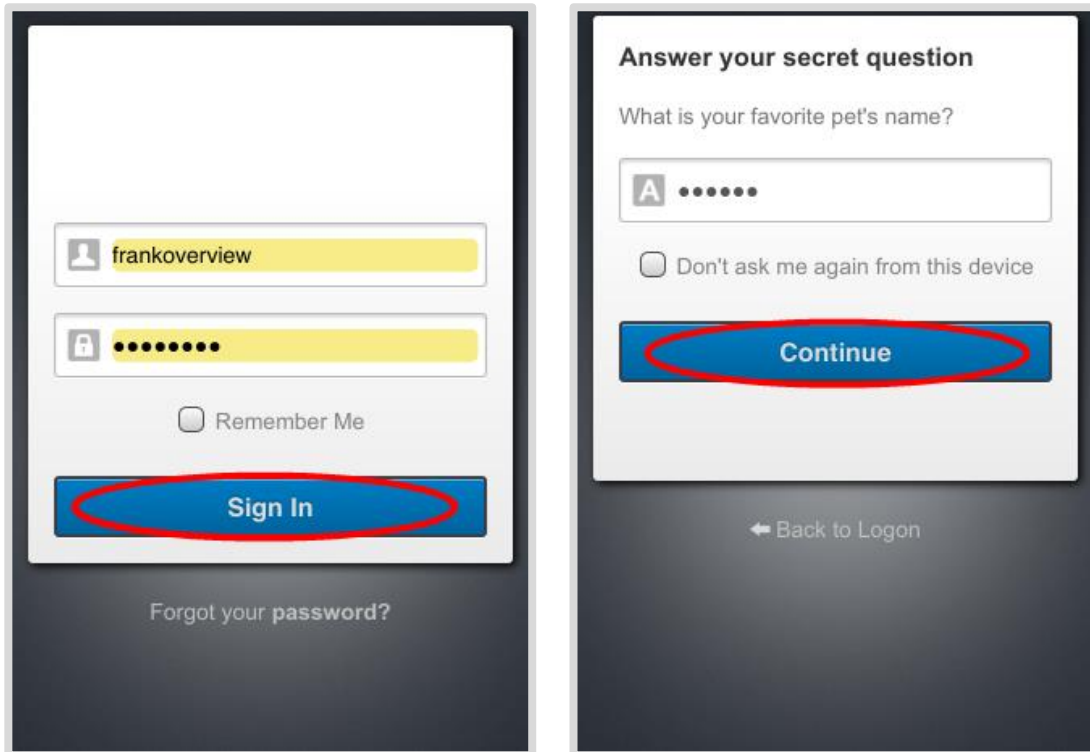


Mobile Site Overview

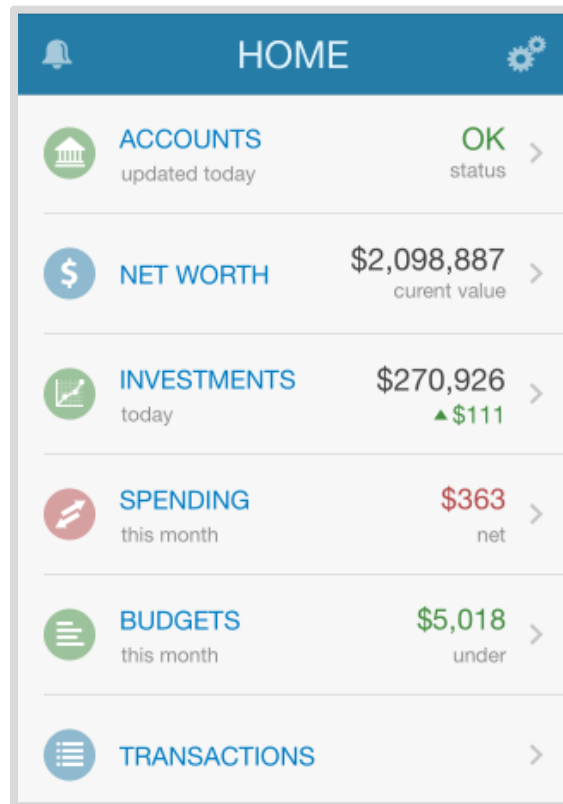
This training guide will demonstrate the functionality of the Mobile Client Site. The Mobile Client Site is a consolidated view of the financial information in your personal financial website.

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

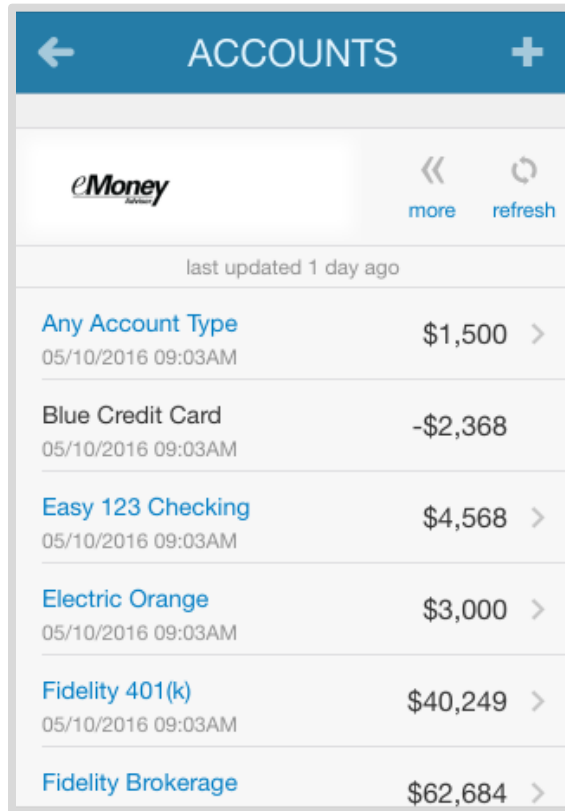
1. From your smart phone, click the mobile app and log in.




- Once authenticated, you will see a summary of your financial profile.



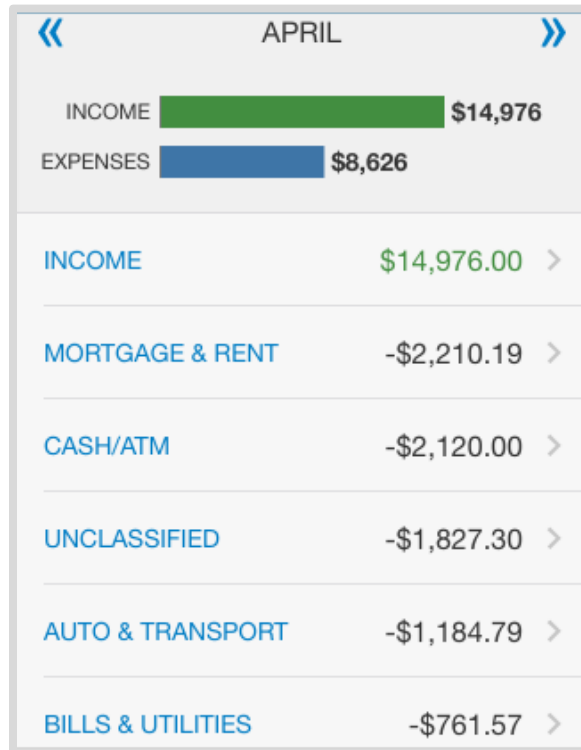
3. **Accounts** will allow you to view your latest account data, while also informing you of any maintenance required when necessary.



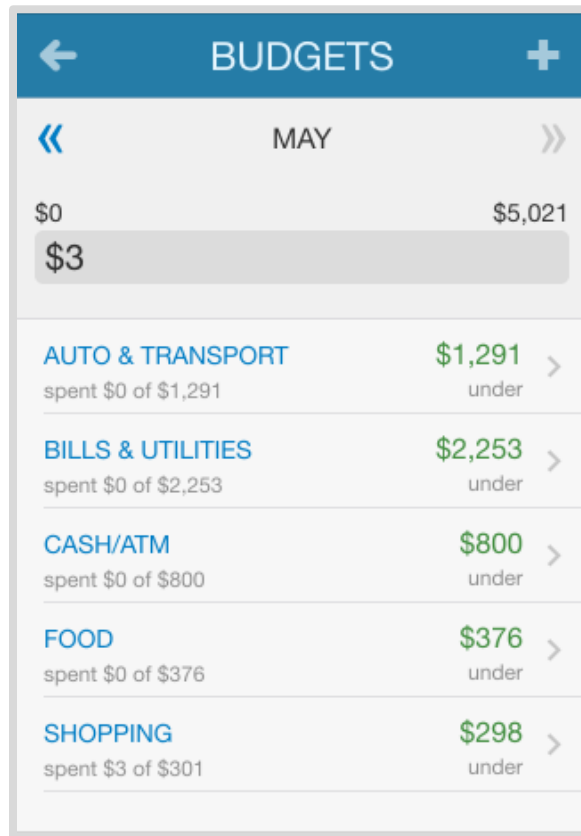
ACCOUNTS	
 more refresh	
last updated 1 day ago	
Any Account Type 05/10/2016 09:03AM	\$1,500 >
Blue Credit Card 05/10/2016 09:03AM	-\$2,368
Easy 123 Checking 05/10/2016 09:03AM	\$4,568 >
Electric Orange 05/10/2016 09:03AM	\$3,000 >
Fidelity 401(k) 05/10/2016 09:03AM	\$40,249 >
Fidelity Brokerage	\$62,684 >

Mobile Site Overview

Spending shows you this month's spending data by category. This data is imported directly from connected accounts. You can scroll through previous months by using the << >> arrows.

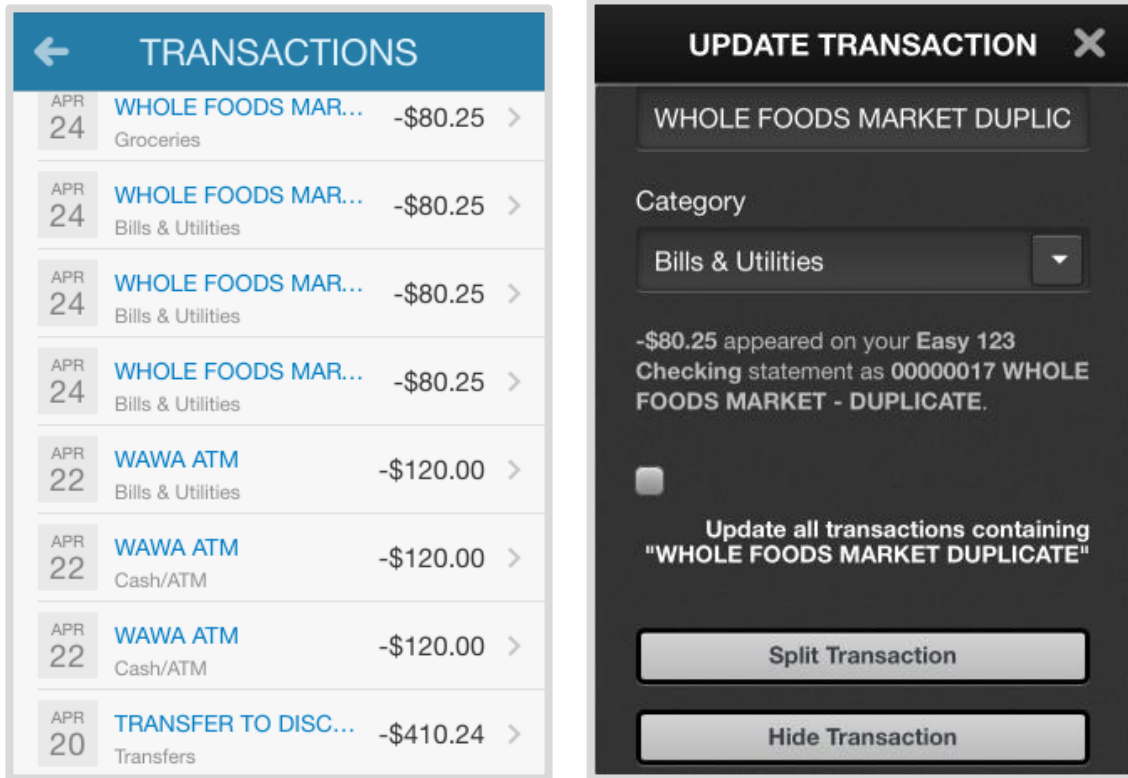


4. Tap the Budgets tab to see a snapshot of your budget.



Mobile Site Overview

5. Tap Transactions to view your recent transaction details from your connected accounts. You can tap into any transaction to see further details or to re-categorize.



TRANSACTIONS

Date	Description	Amount
APR 24	WHOLE FOODS MAR... Groceries	-\$80.25
APR 24	WHOLE FOODS MAR... Bills & Utilities	-\$80.25
APR 24	WHOLE FOODS MAR... Bills & Utilities	-\$80.25
APR 24	WHOLE FOODS MAR... Bills & Utilities	-\$80.25
APR 22	WAWA ATM Bills & Utilities	-\$120.00
APR 22	WAWA ATM Cash/ATM	-\$120.00
APR 22	WAWA ATM Cash/ATM	-\$120.00
APR 20	TRANSFER TO DISC... Transfers	-\$410.24

UPDATE TRANSACTION

WHOLE FOODS MARKET DUPLIC

Category: Bills & Utilities

-\$80.25 appeared on your Easy 123 Checking statement as 00000017 WHOLE FOODS MARKET - DUPLICATE.

Update all transactions containing "WHOLE FOODS MARKET DUPLICATE"

Split Transaction

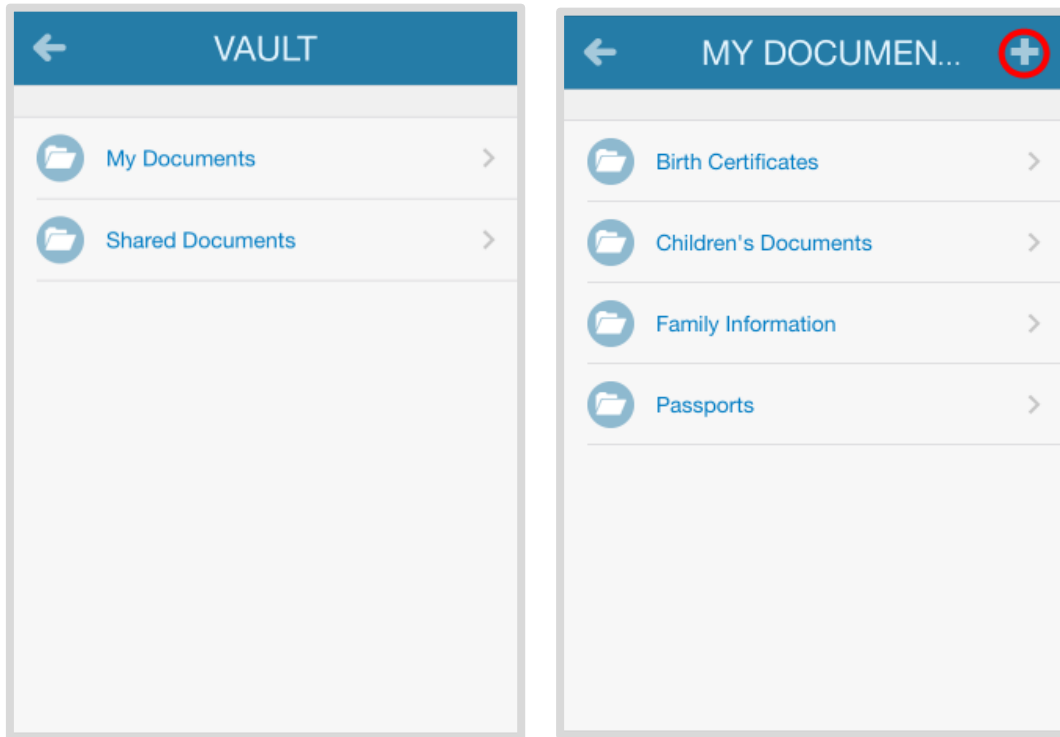
Hide Transaction

6. Tap Investments to view up-to-date market information for any connected investment. Here you can tap into any account and view a holdings breakdown of that account

INVESTMENTS	
CURRENT VALUE	
\$270,926	
▲ \$111 ▲ 0.04%	
TODAY'S CHANGE	
Any Account Type	\$1,500.00 >
05/10/2016 09:03AM	
Fidelity 401(k)	\$59,635.89 >
05/11/2016 04:02PM ▲ \$16	
Fidelity Brokerage	\$101,588.79 >
05/11/2016 04:02PM ▲ \$79	
Health Savings Account	\$48,565.51 >
05/10/2016 04:00PM	
Orion Investments	\$59,635.89 >
05/11/2016 04:02PM ▲ \$16	
Taxable Investment	\$0.00 >

FIDELITY 401(K)	
\$59,635.89	
▲ \$16.00 ▲ 0.03%	
TODAY'S CHANGE	
Cash	\$90.00
Holdings	\$59,545.89
Holding	Value »
AGG iShares Core U.S. Aggregate Bond ...	\$5,554.50
JAWWX Janus Global Research Fund T Shares	\$7,576.25
UGI	\$8,344.00

7. Tap Vault to view personal documents in electronic format.



Mobile Site Overview

The **My Documents** folder is hidden from your advisor. The **Shared Documents** folder can be viewed by your advisor. To upload into either folder, tap that folder and tap the subfolder you want to upload into. Then click the + symbol in the top right.

