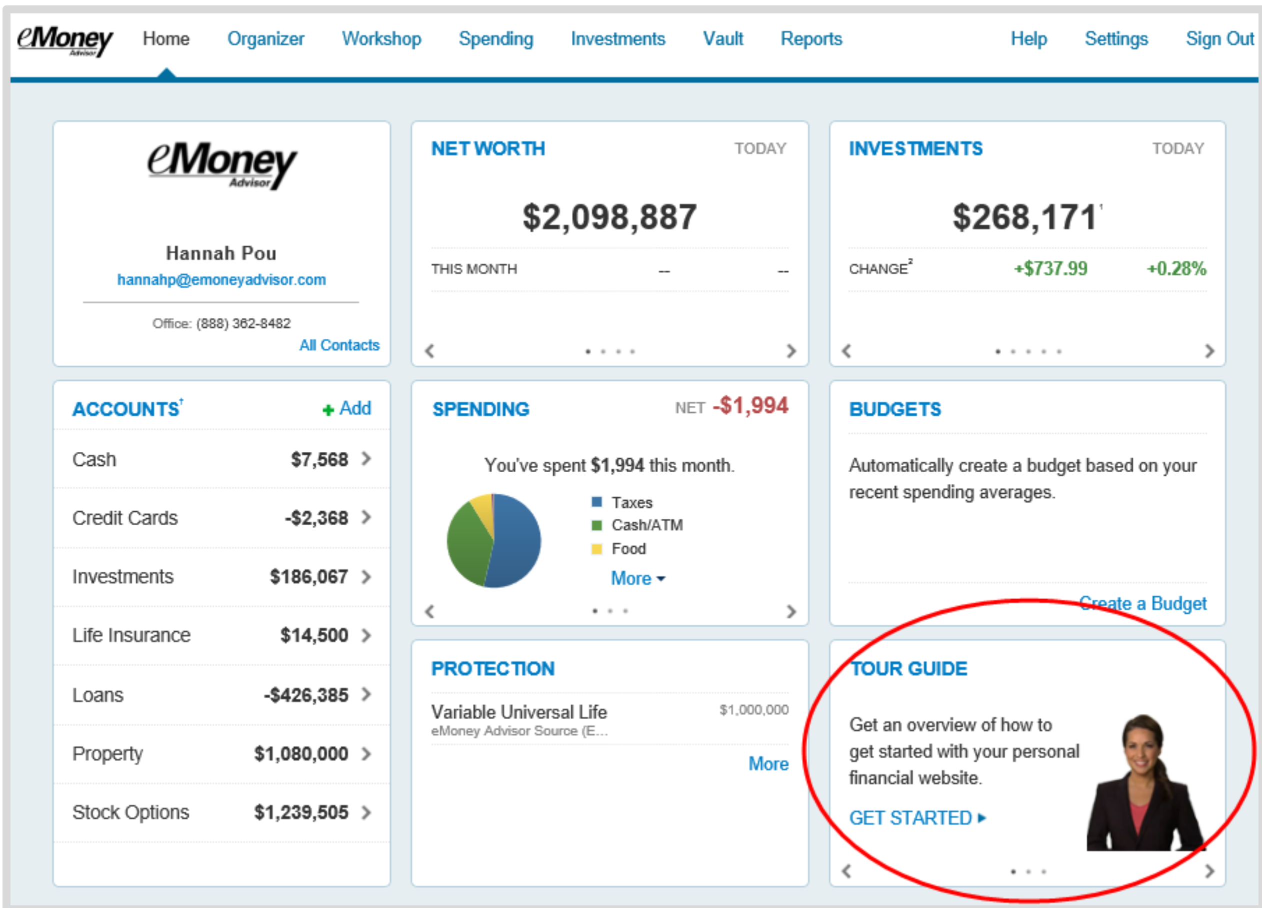
Personal Financial Website Overview

This overview will guide you through 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.

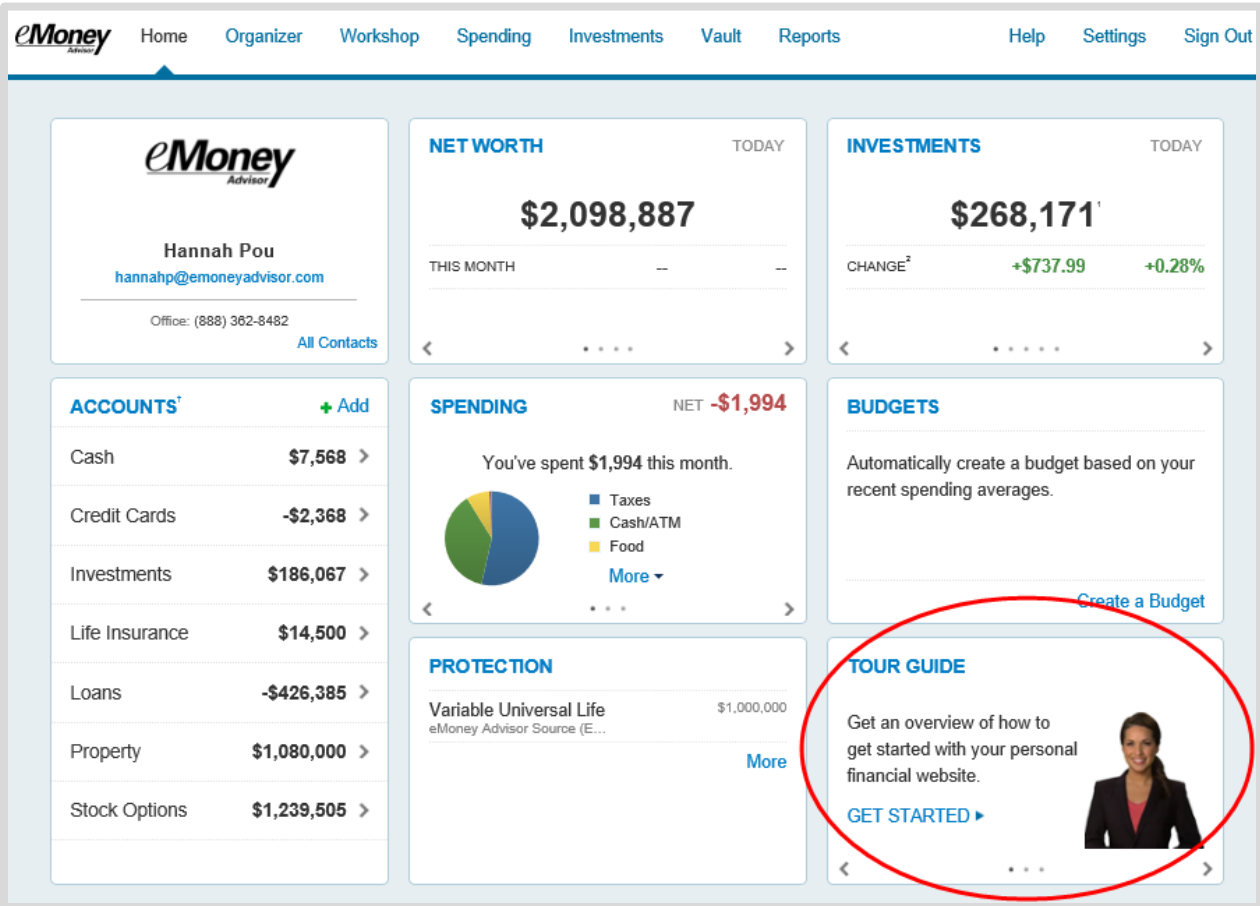
Before your first login, you will be prompted to establish 3 security questions.

1. From your financial Home page, you will notice a tour guide in the bottom right tile. These brief videos will walk you through the different areas of this portal.

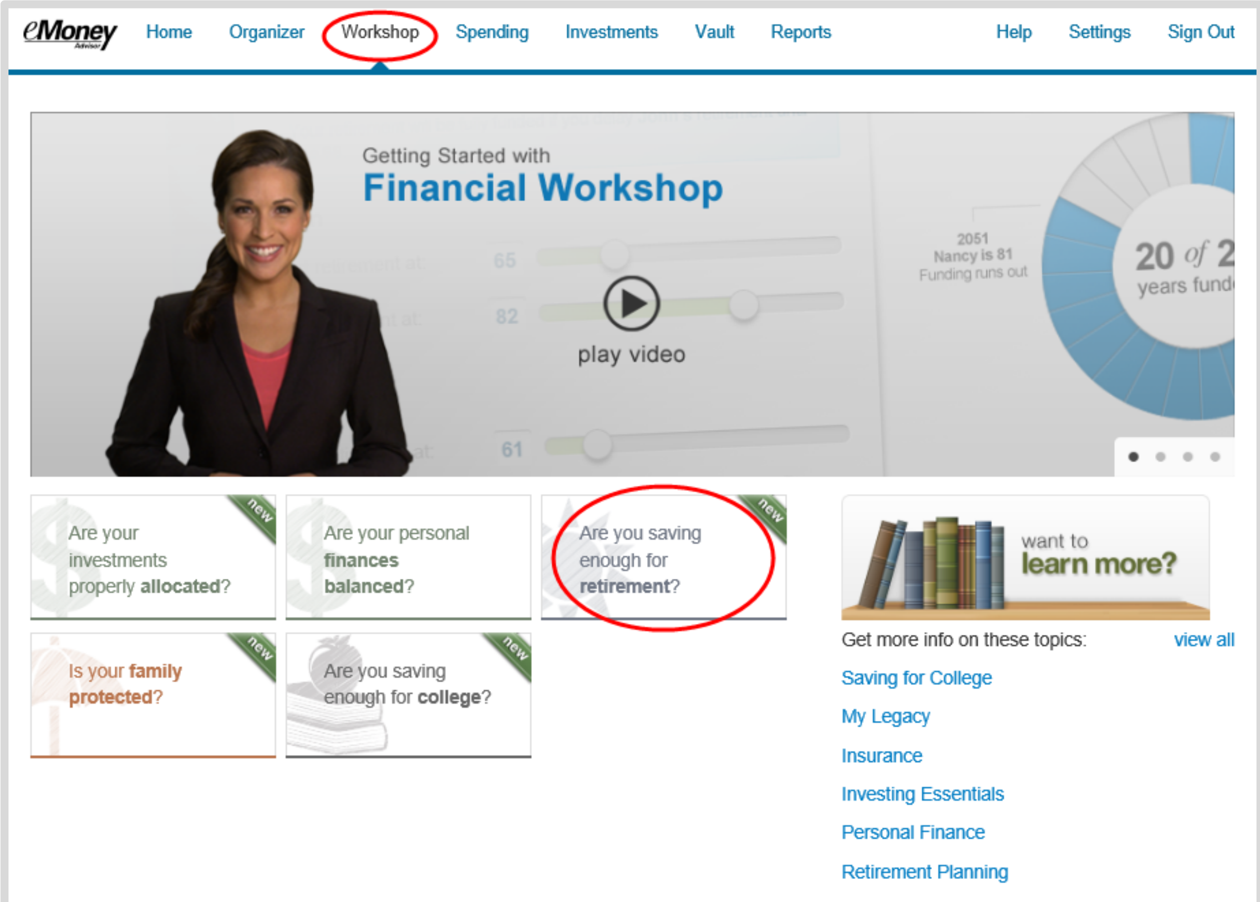


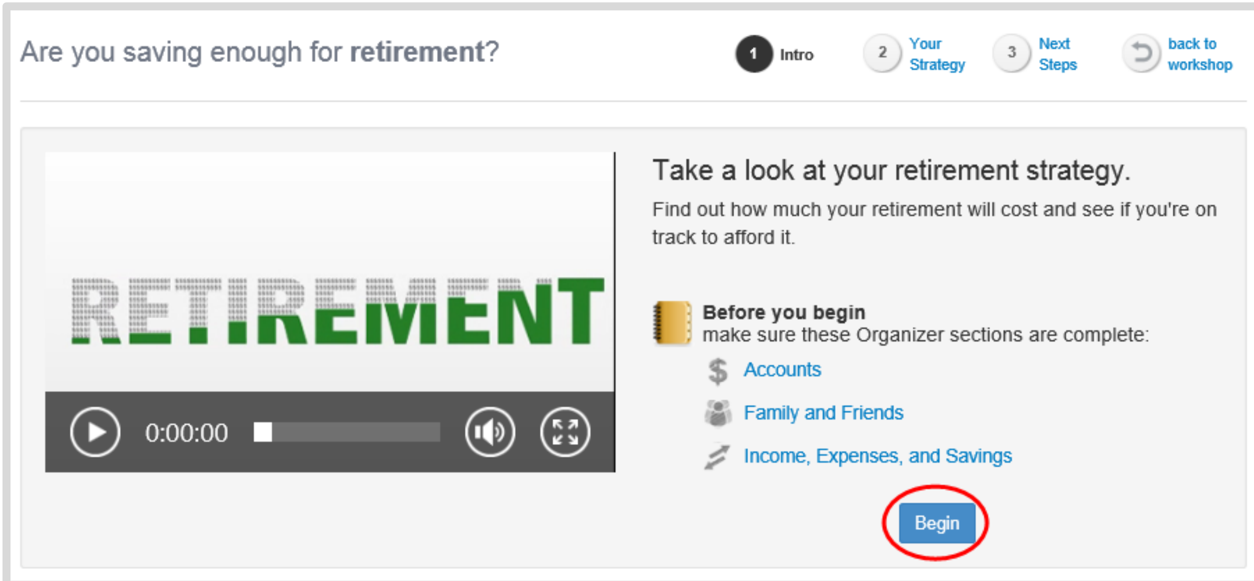
Your **Home** page is a living snapshot of your financial wellbeing. The Home page is a high-level view of your financial information. This page is divided into separate tiles that represent the information contained within a particular section of the application.

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.

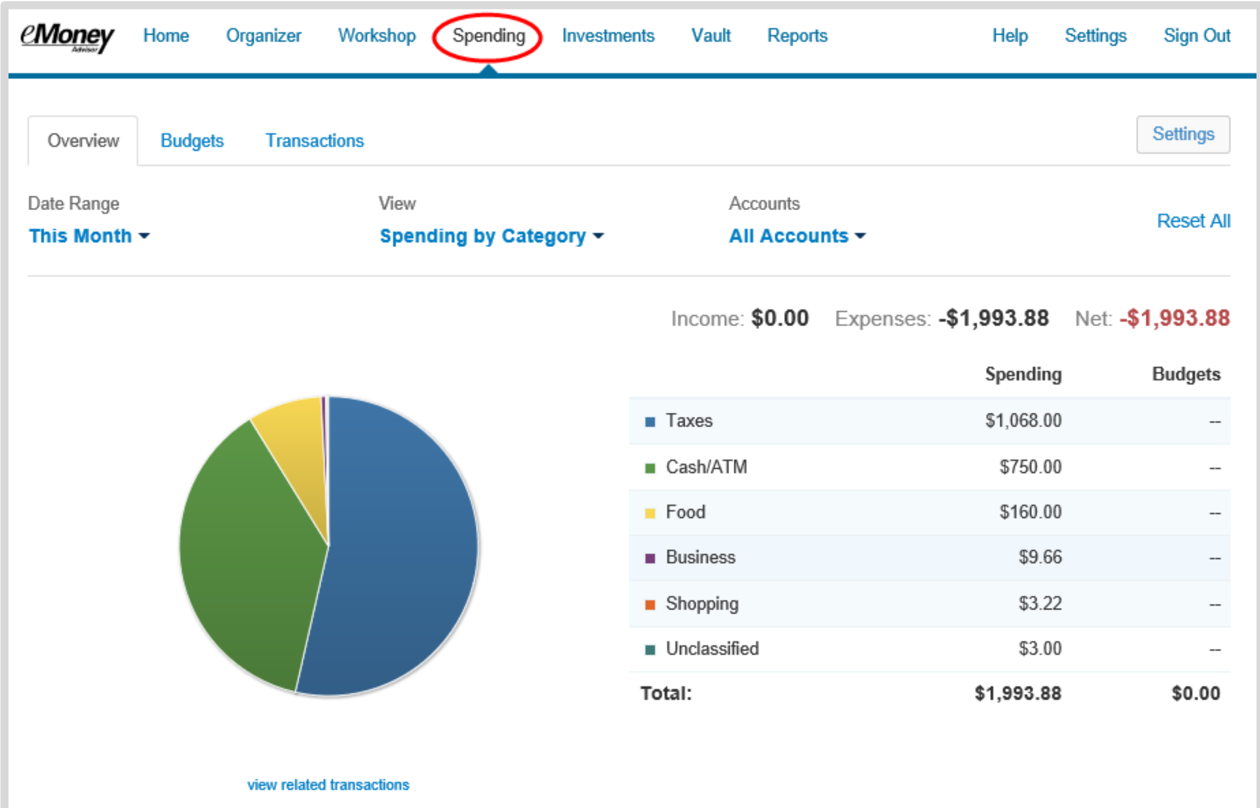


3. The **workshops** page can help you take a closer look at your retirement strategy, insurance protection, and education goals. Select a workshop and before you begin, verify you've completed the appropriate organizer sections.

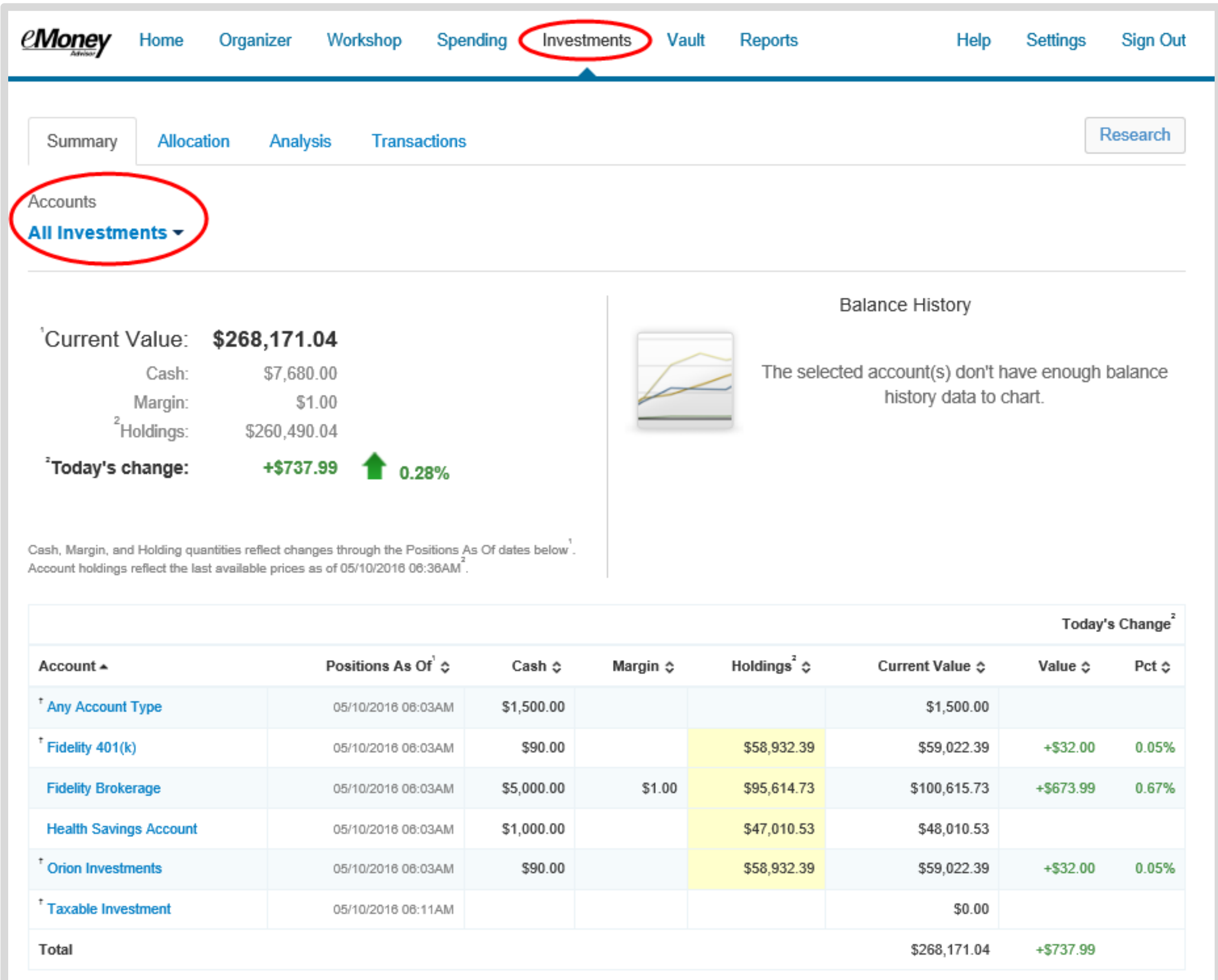



Are you saving enough for retirement?
1 Intro
2 Your Strategy
3 Next Steps
back to workshop
RETIREMENT
0:00:00
Take a look at your retirement strategy.
Find out how much your retirement will cost and see if you're on track to afford it.
Before you begin
make sure these Organizer sections are complete:
Accounts
Family and Friends
Income, Expenses, and Savings
Begin

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 tab, Budgets tab, and Transactions tab. Use these pieces together to create the most accurate view of your spending and your current budget.

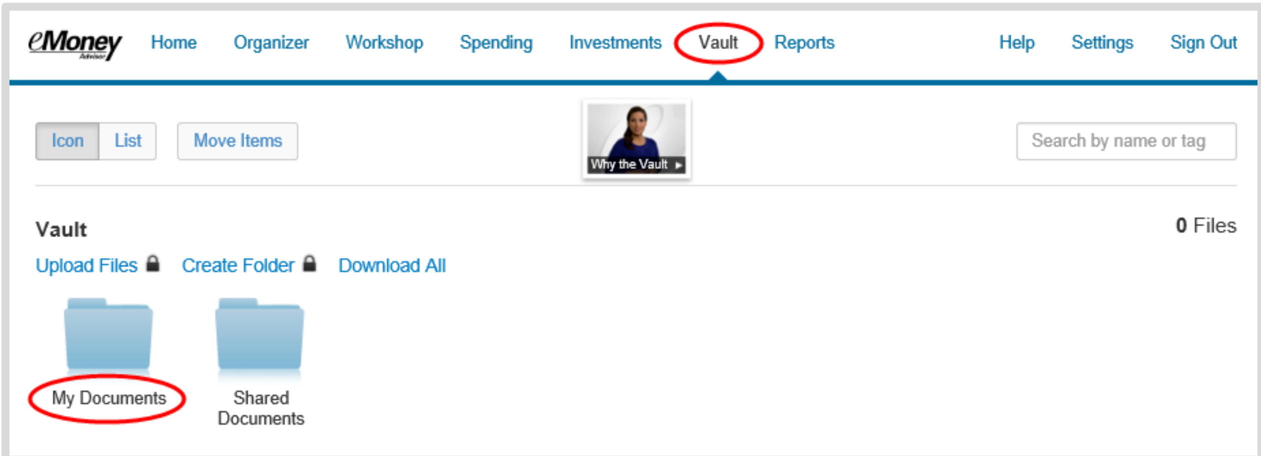


The **investments** tab is made up of four components: Summary, Allocation, Analysis, and Transactions. These will provide you with an overall view of your investments as well as the ability to drill into individual accounts & asset breakdowns.

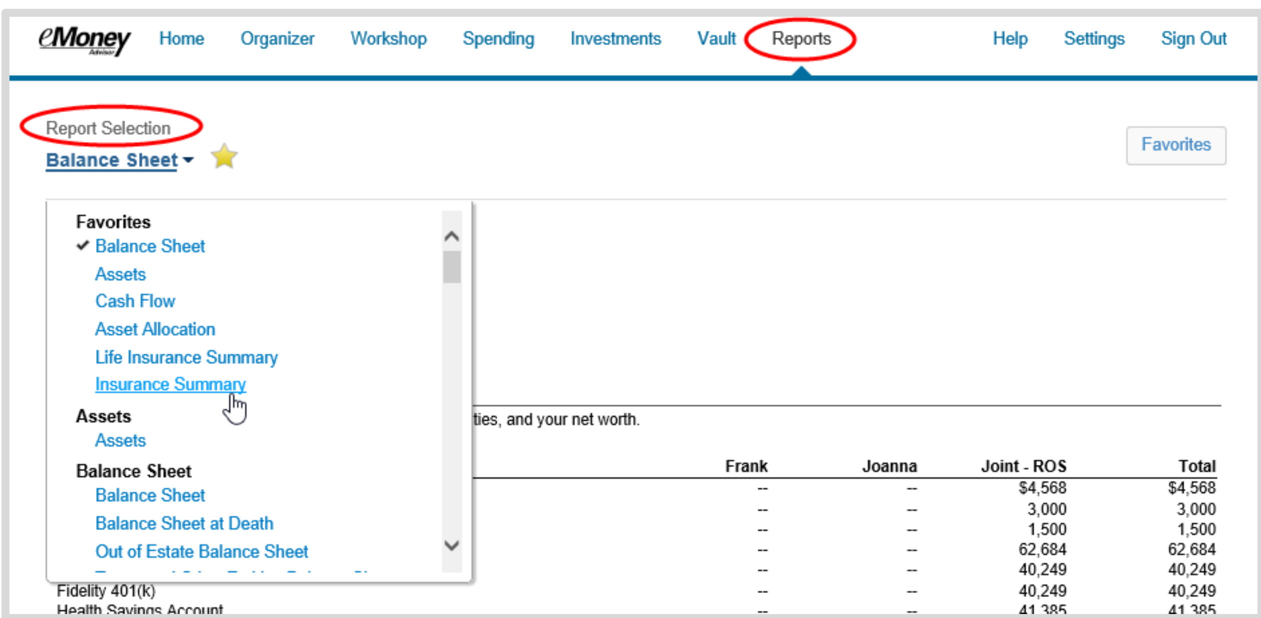


Account	Positions As Of[1]	Cash	Margin	Holdings[2]	Current Value	Today's Change[2] Value	Pct
[†] Any Account Type	05/10/2016 06:03AM	$1,500.00			$1,500.00		
[†] Fidelity 401(k)	05/10/2016 06:03AM	$90.00		$58,932.39	$59,022.39	+$32.00	0.05%
Fidelity Brokerage	05/10/2016 06:03AM	$5,000.00	$1.00	$95,614.73	$100,615.73	+$673.99	0.67%
Health Savings Account	05/10/2016 06:03AM	$1,000.00		$47,010.53	$48,010.53		
[†] Orion Investments	05/10/2016 06:03AM	$90.00		$58,932.39	$59,022.39	+$32.00	0.05%
[†] Taxable Investment	05/10/2016 06:11AM				$0.00		
Total					$268,171.04	+$737.99	

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.



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



6. The **Settings** page is where you can set up alerts, update your security information (passwords & questions), and permission your advisor to see spending information through the Privacy tab.