Your Financial Dashboard

Getting set up on the dashboard is a quick process. It should take just a few minutes and you will be ready to go!
Here is a step-by-step guide:

Registering

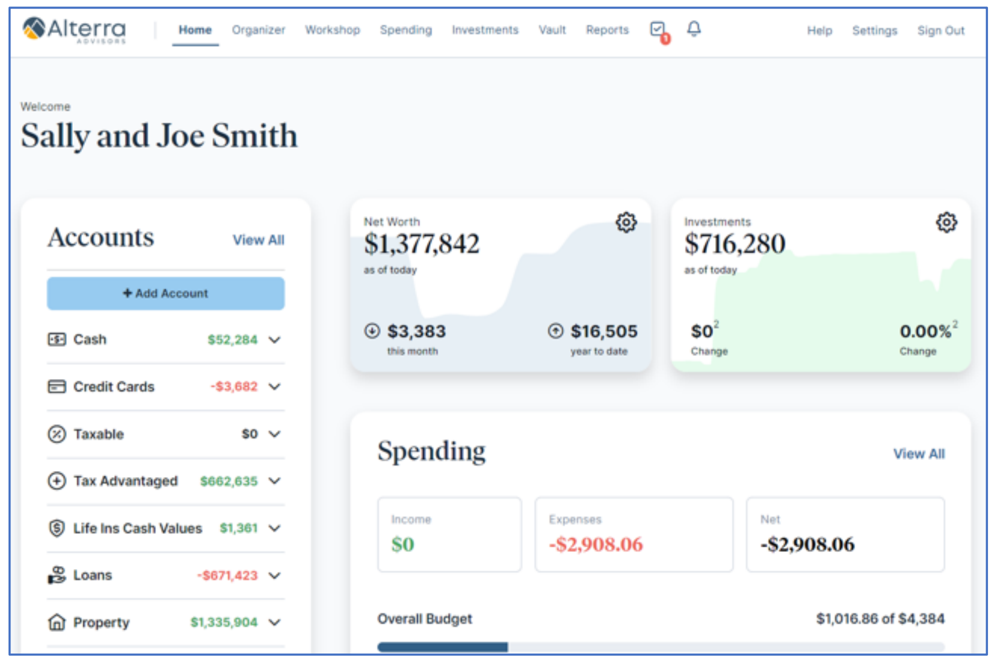
You will receive an email titled **Register for your Financial Dashboard.**

- Click the **Register Now** button
- Follow the prompts to setup your username and password.
  - You will then be prompted to enter your phone number for 2-factor authentication. This one quick step helps maintain the high level of security your Financial Dashboard offers.
- A code will be sent via text message to the phone number you provided; enter that code on the following screen.
- Pick three security questions that you will have to answer in the future when you log in from a new device. Make sure to pick answers you will remember!
- Read and accept the terms of service, and that's it.

Welcome to your Financial Dashboard!

First Look at your Financial Dashboard

Once you are logged in, you will see something like the image below and will be prompted to take a quick tour of the page. The accounts we manage for you will already be there for you to review.



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Your Financial Dashboard

Adding Accounts

To get the most out of your Financial Dashboard, we highly recommend that you add all your accounts so that you can see everything in one place. To do so, follow these steps:

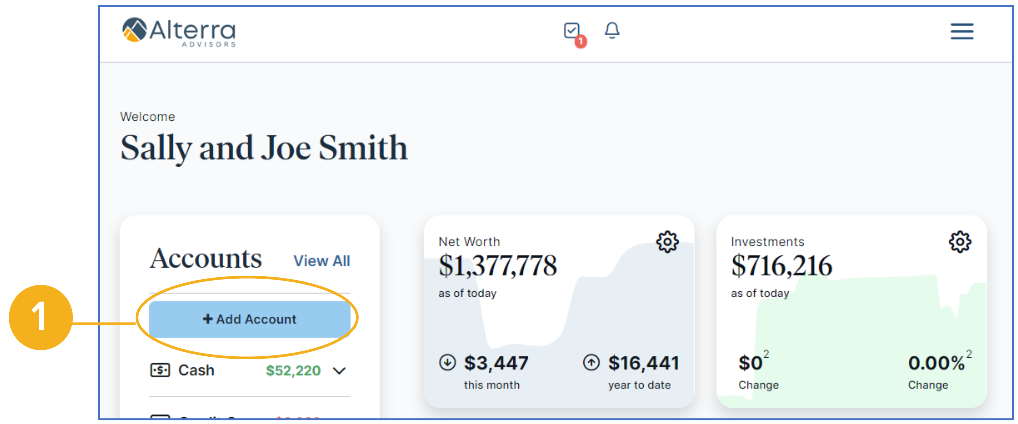
1. Click on the **+Add Account** button shown to the left.

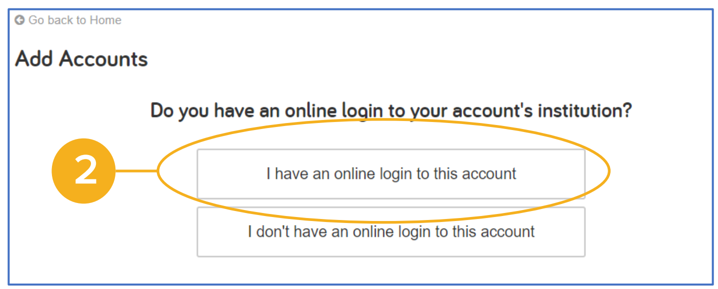
2. Select if you have an online login for the account you want to add.

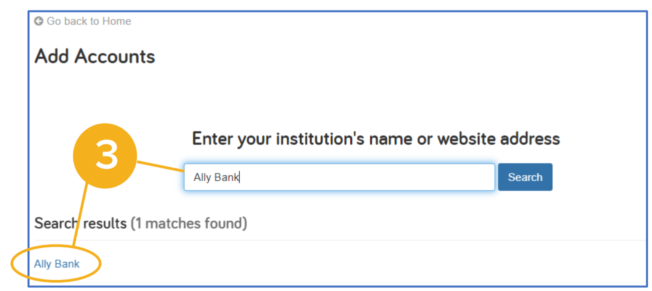
   ***Note:** If you do not have an online login, we will show you how to manually add accounts a few steps down.

3. Enter the institution's name or website and click **Search**.

   From the results found, select the appropriate link shown left.







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Your Financial Dashboard

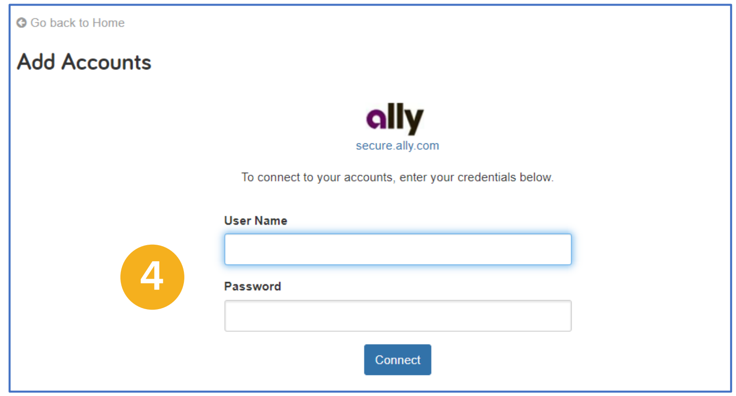
Adding Accounts (Cont.)

4 Enter your login credentials for the institution and click **Connect**.

If your financial institution has 2 factor authentication, your will be prompted to complete that process. It will be the same process you use to login into your financial institutions website.

Once your credentials are verified, click **Continue** to return to your overview where you will now see your added account.

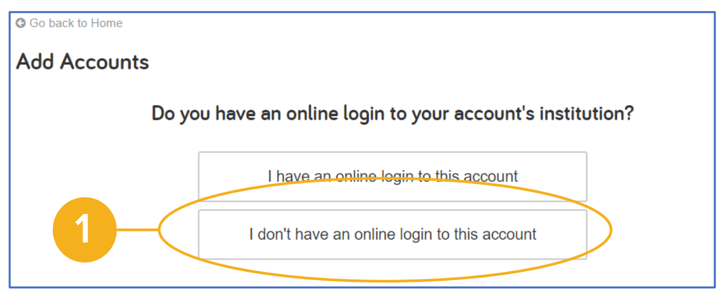
If there is an issue connecting to your account, you'll receive a status message describing the problem. Click on that message, or reach out to Client Care Coordinator, to solve it together.



Manually Adding Accounts

If you do not have an online login to an institution, follow the steps below to enter accounts manually. While manual accounts do not update, they help build a better financial snapshot for both you and your advisor.

1 After clicking **+Add Account**, select, **I don't have an online login to this account**.



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Your Financial Dashboard

Manually Adding Accounts (Cont.)

2 Select the type of account. If you're not sure which account type to choose, reach out to your advising team to help with manually adding accounts.

3 Enter details about the account and click **Save.**

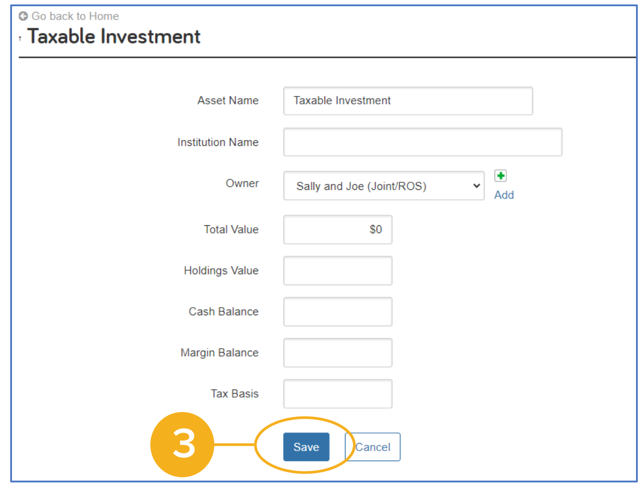
Dashboard Maintenance

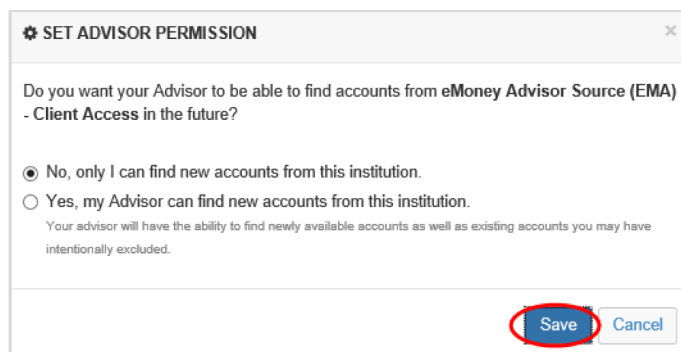
Each connection you establish will require its own specific maintenance. For example, if you update your password to log in to the institution, you will need to update those credentials in your portal as well.

The **Settings** link gives you the option to enable your advisor to find new accounts on your behalf.

QUESTIONS?

Reach out to your Client Care to help with any questions you have about your Financial Dashboard..





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