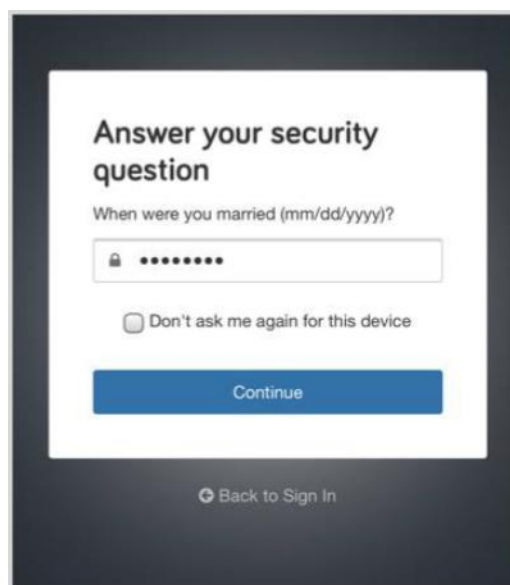
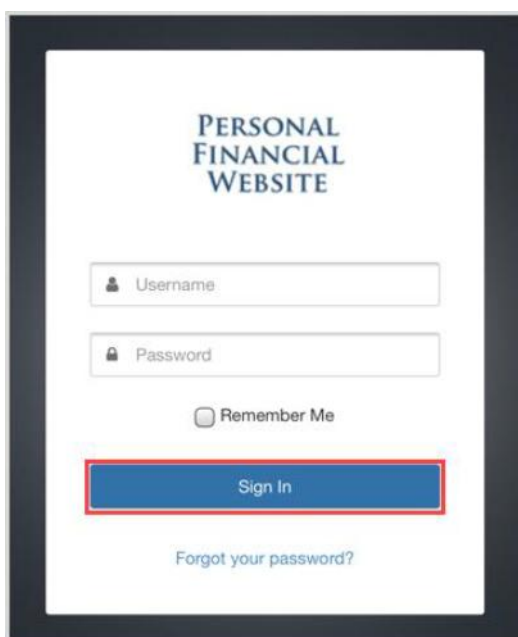


# Mobile Website Overview

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

**Please note:** To access your website, use your normal login URL. You can refer to the confirmation email sent to you when you first registered your access.

1. From the log in screen, enter in your **credentials** and click **Sign In**. You may be prompted with a security challenge or to enter in a passcode if you previously set one up. Security Questions and Passcodes are managed from the Security Settings outlined later in this guide.



2. Once successfully authenticated, you will be taken to your Home page which consolidates all the data we have entered into your website so far. We will dive into each feature from the **MENU** drop-down; Click the **categories** below for quick access to a specific page.

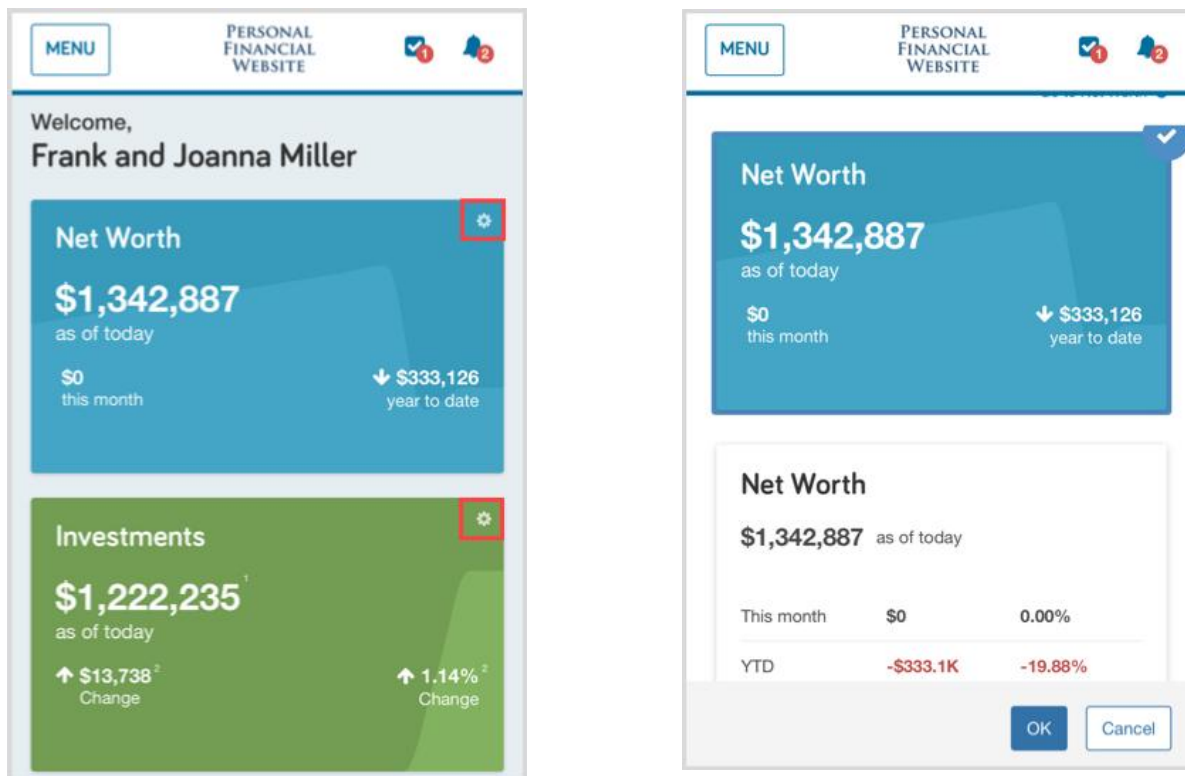


**Home Organizer Spending Investments Goals**  
**Vault Reports Settings**

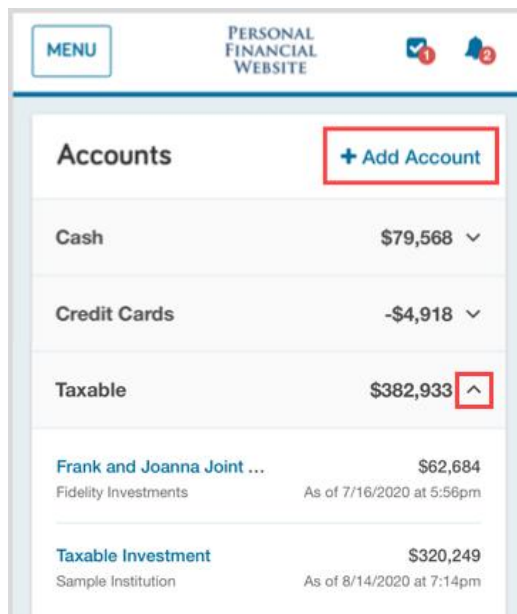
# Mobile Website Overview

## Home

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

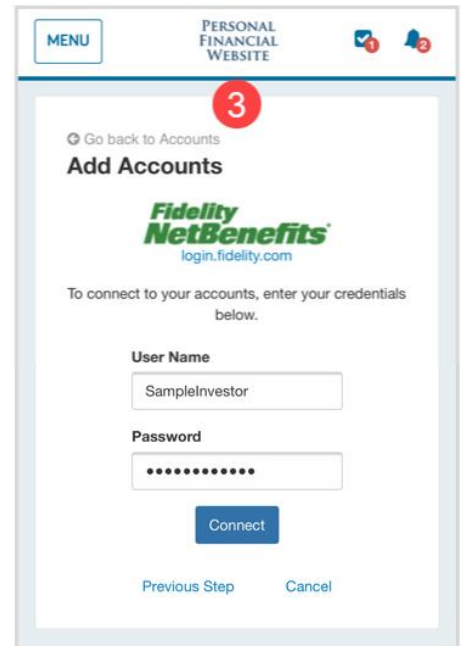
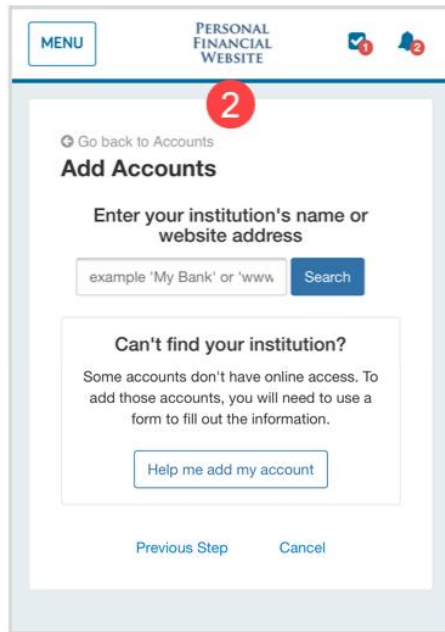
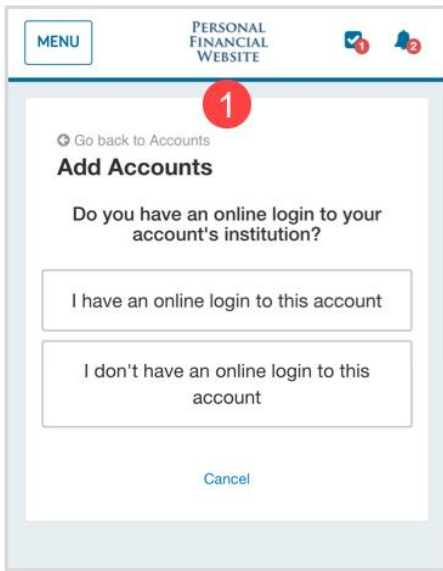


- As you scroll down the Home page you will see your Accounts organized into categories. Click the **arrow** on a category to expand or close the view of accounts within that category. If you notice any accounts are not listed, click **+ Add Account** to connect to your financial institution.

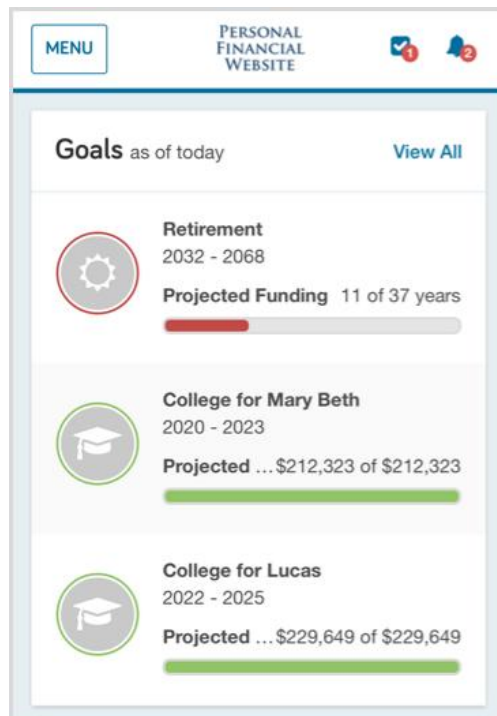


# Mobile Website Overview

- You will be asked if you have an online login to the account. Selecting *I don't have an online login*, will prompt you to manually add your account. For this example, we will select the first option – **I have an online login to this account**.
- Search** for your institution and select the one where your accounts are held.
- Enter your institution **credentials** and click **Connect**. After your credentials are successfully authenticated, your accounts will populate into your Organizer.

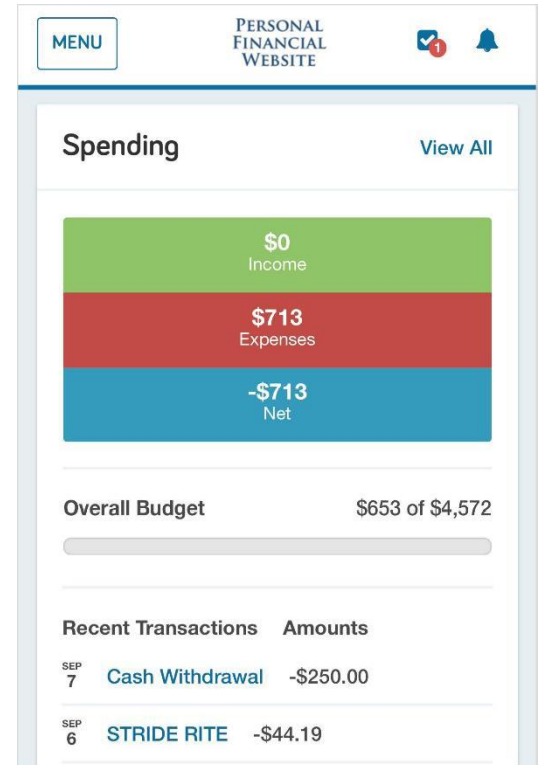
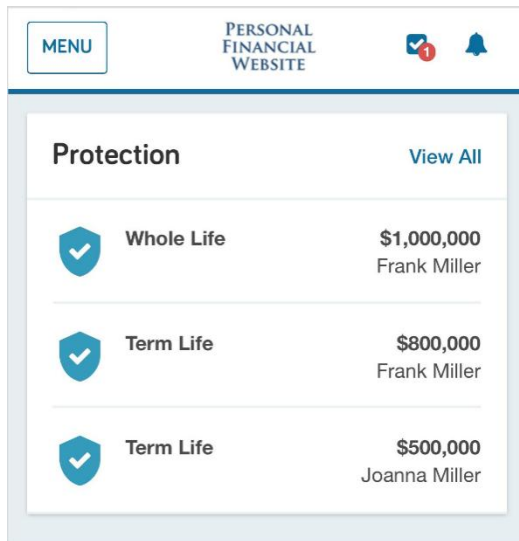


- Back on the Home page, below Accounts, is a snapshot of your **Goals**, showing the projected funding of each one. Red indicates the projected funding is falling short, and green indicates the Goal is currently projected to be fully funded.



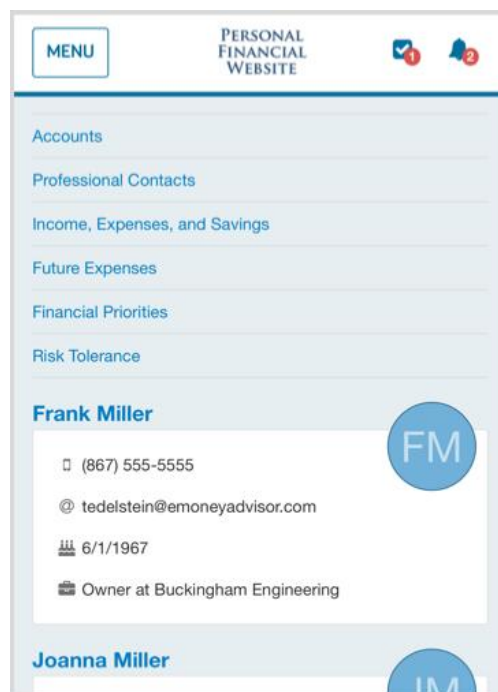
# Mobile Website Overview

- Below your Goals is a snapshot of your **Spending**, Overall Budget, and Recent Transactions. After you have connected your bank accounts, such as your Checking account and Credit Cards, your transactions will pull populate the Spending section of your website.
- Lastly, below Spending is **Protection**, which displays your three highest valued insurance accounts i.e. Life Insurance, Homeowners Insurance, Auto Insurance etc.



## Organizer

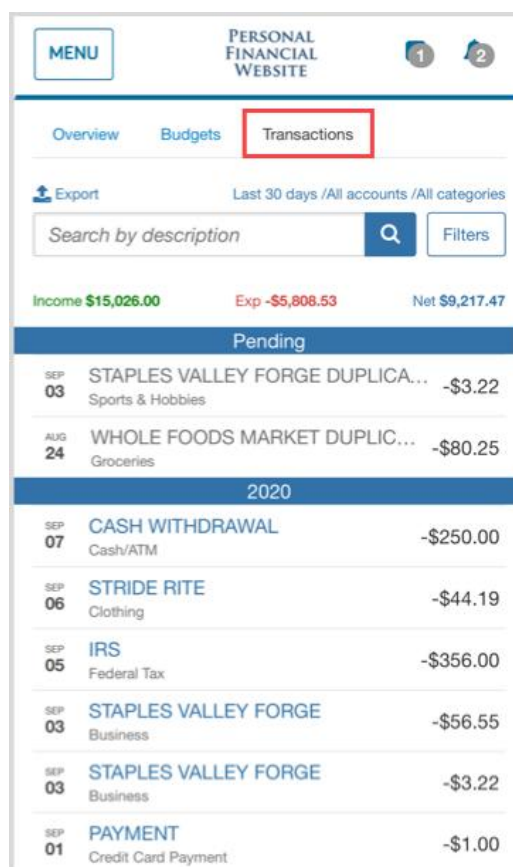
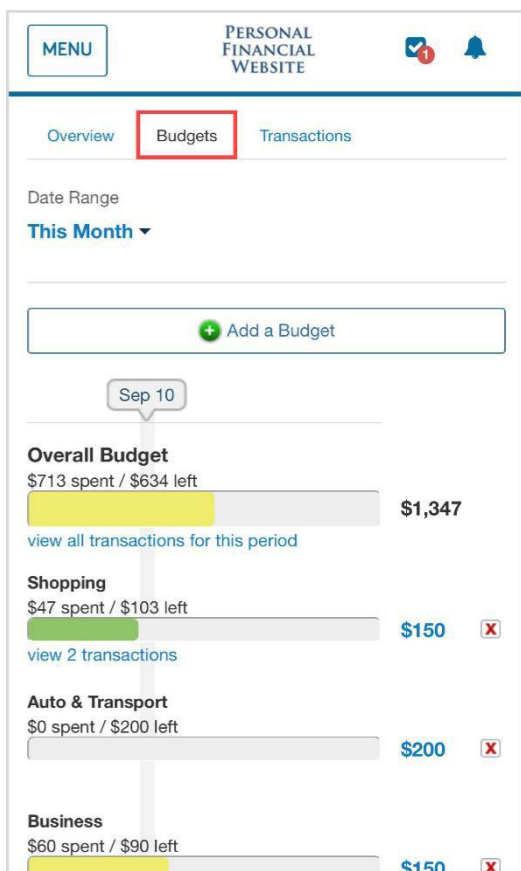
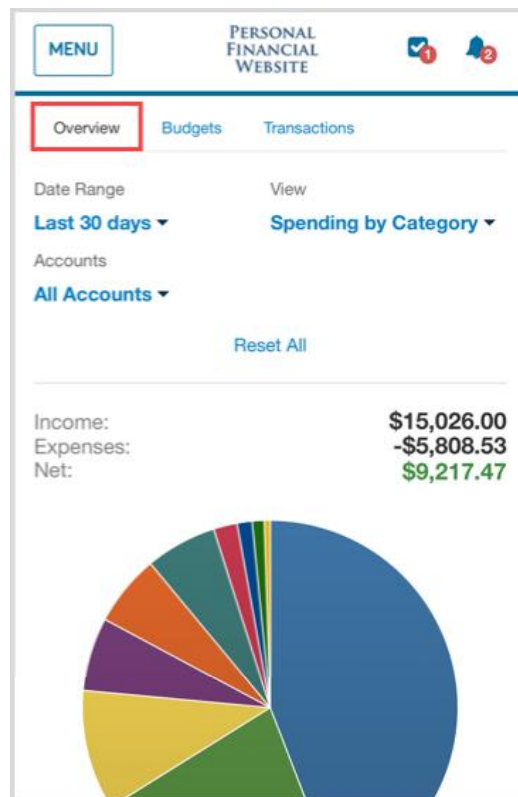
- The Organizer is where you can view and modify your information. Click the corresponding links to view more detail about Property, Accounts, Income, Expenses, Savings, and Future Goals. To edit Family and Contact information, simply click your **name**.



# Mobile Website Overview

## Spending

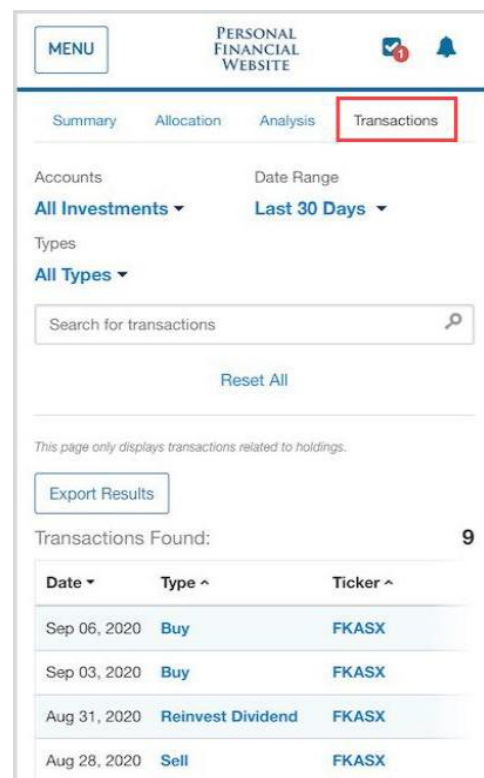
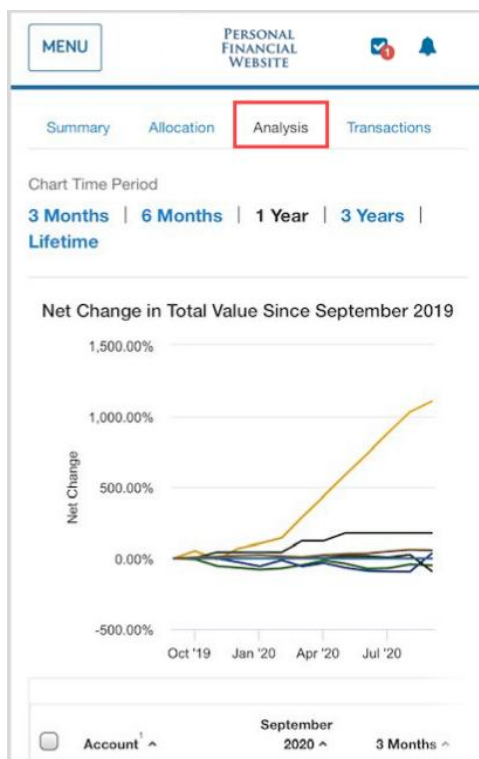
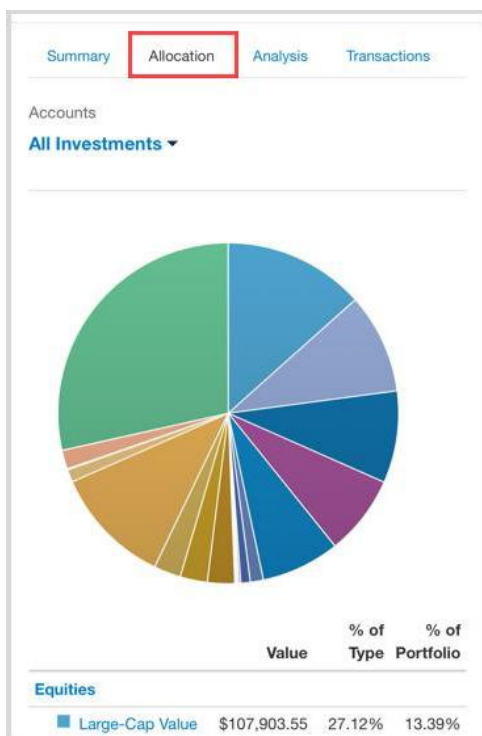
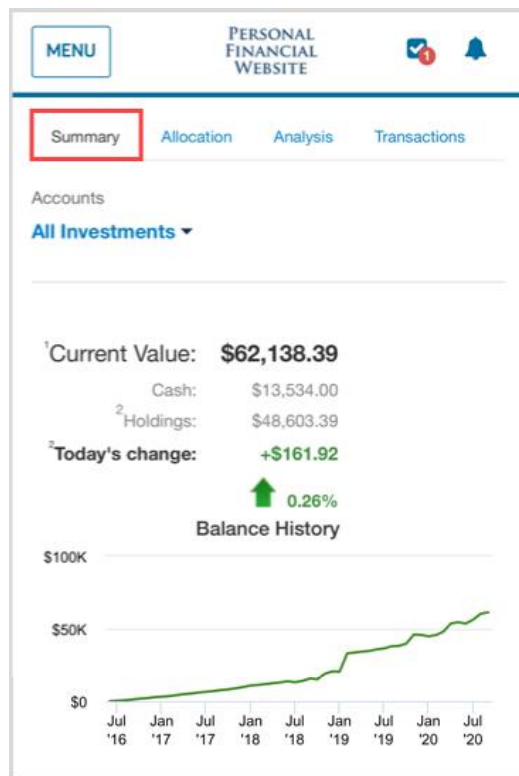
1. The **Overview** tab includes a pie chart of your spending by category. You can customize a specific Date Range, view one Account or All Accounts, as well as view different charts by selecting the View dropdown. This feature is a great way to stay on top of your income and expenses!
2. The **Budgets** tab helps you track what you are spending on a monthly basis. You can customize your Budget by adding, editing, or deleting categories.
3. The **Transactions** tab contains transactions from your connected accounts sent by your financial institution. The information in both tabs is used to populate your Overview.



# Mobile Website Overview

## Investments

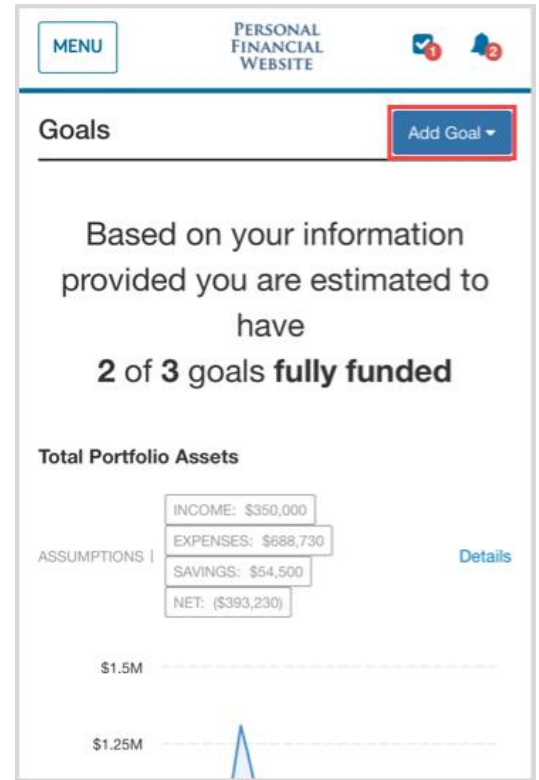
1. The **Summary** tab reviews your account Balance History for all Investments. Clicking into an account will filter the Holdings and Balance History on the account level.
2. The **Allocation** tab will display how your total investment portfolio is allocated as well as individual accounts.
3. The **Analysis** tab provides an insightful chart with the net change in total value since your account was added to your Personal Financial Website.
4. The **Transactions** tab displays your investment transactions such as Buys, Sells, and Dividends. This information is coming directly from your connected financial institution.



# Mobile Website Overview

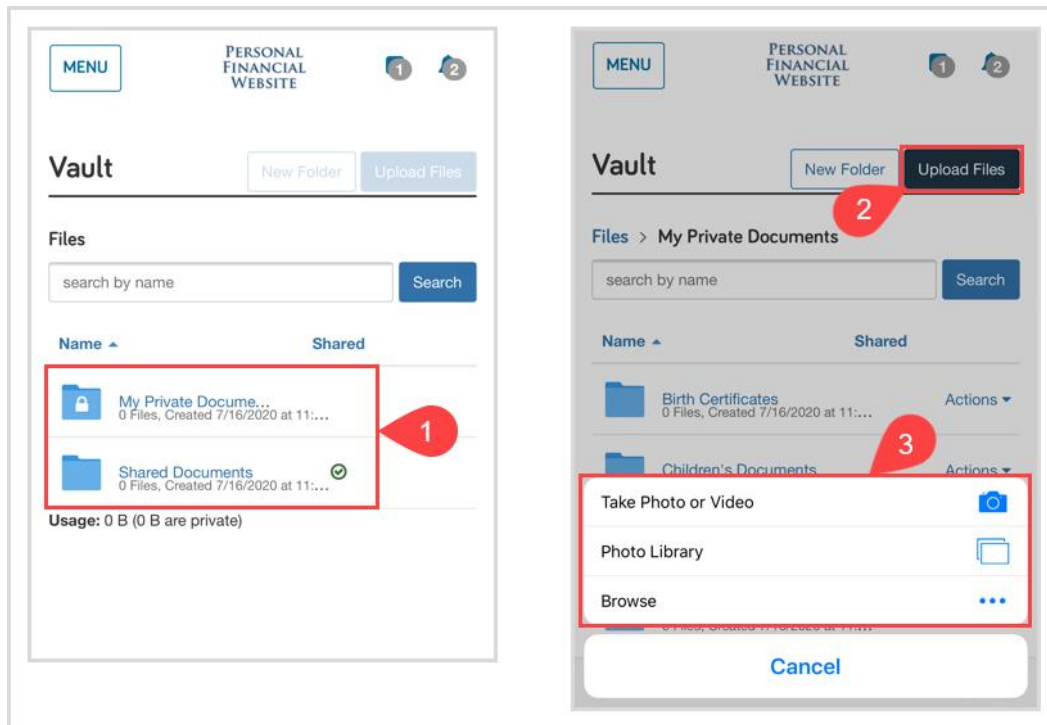
## Goals

- Goals allow you to track funding towards important financial milestones. Create new Goals by clicking **Add Goal** and assigning a funding source. You can track existing goals by scrolling down your page. Each goal can be individually analyzed, but the landing screen will give a great view of everything all in one place.



## Vault

- Your **Vault** is where you can access all previously uploaded files as well as upload new files. To upload a file, click into either the **My Private Documents** or **Shared Documents** folder.
- Click **Upload Files**
- Choose from the available options. Note that when you take a photo with your camera, it will save directly into the Vault and not be stored on your device.



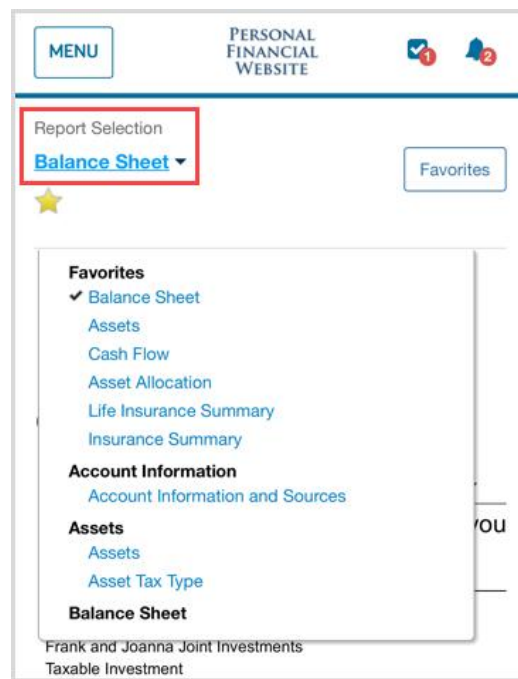
**Please Note:**

- Most common file types are supported.
- The individual file size limit is 30MB.

# Mobile Website Overview

## Reports

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



## Settings

1. The **Alerts** tab allows you to enable and disable various alerts and reminders, such as when your budget exceeds a certain amount, when your insurance policy anniversary is approaching and more. The Alerts bell icon will also trigger notifications.
2. Use the **Security** tab to set up and manage your mobile passcode, password, and security questions.
3. The **Privacy** tab allows you to set up and review your Spending Privacy Permissions.

