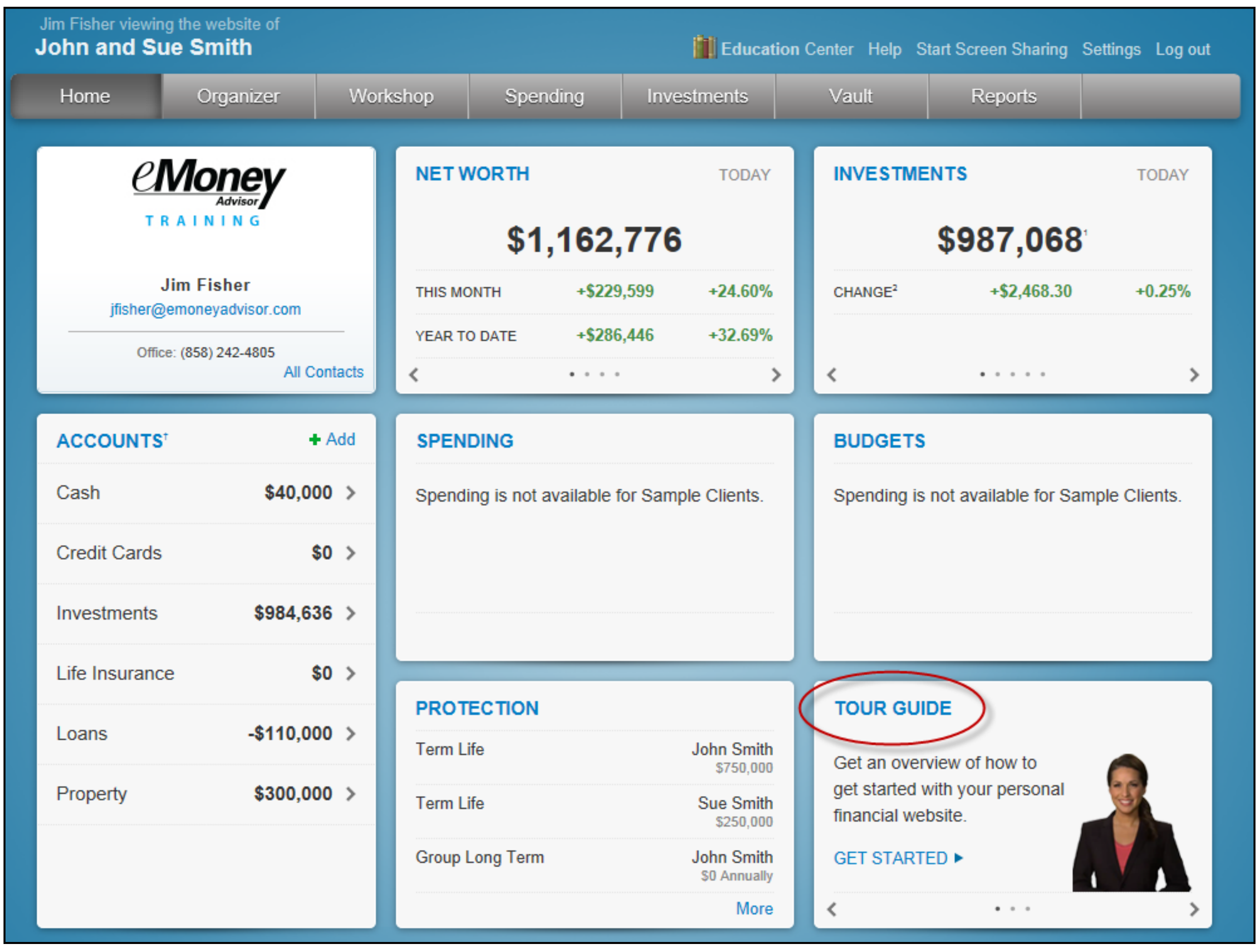
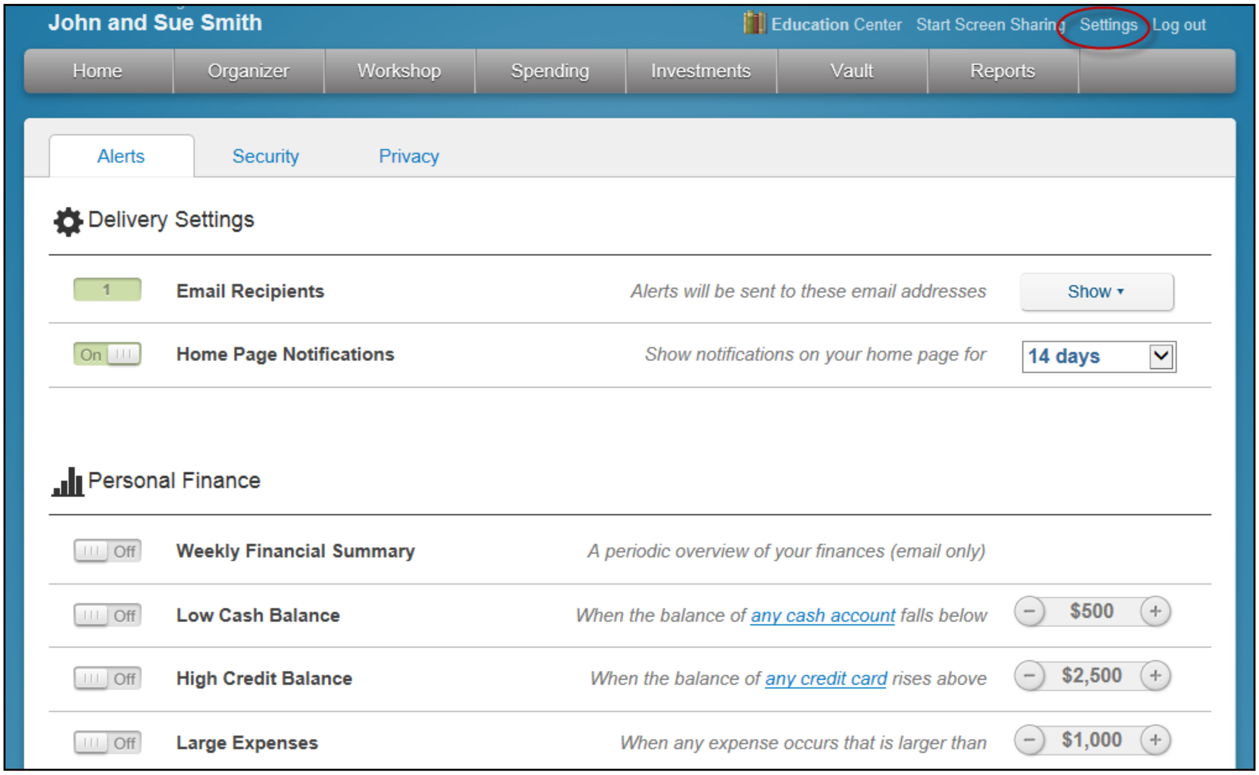
In this user guide, we will demonstrate the **Client Website Overview for Advisors**. Once you create a client website for a client, this will be their own Personal Financial Website that will provide them with a consolidated view of their financial information.

There are many features such as the **Organizer**, **Workshops**, **Budgeting**, **Reports**, and the **Vault** (an online safe deposit box to store digital copies of valuable personal documents such as wills, trusts, passport information, photos, etc.).

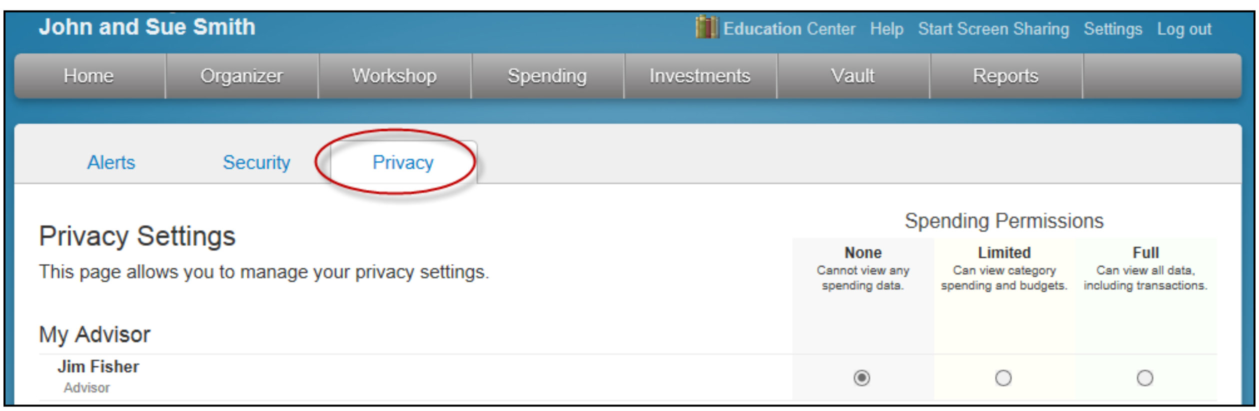
1. At the bottom right hand side of the **Home** page, there is a **Tour Guide** to take your client through their client website.



2. Your client is able to set security & privacy **Settings**.



3. The **Privacy** tab allows your client to control the level of your access to their financial information.



None - Advisor will not have access to any of your client's spending data.

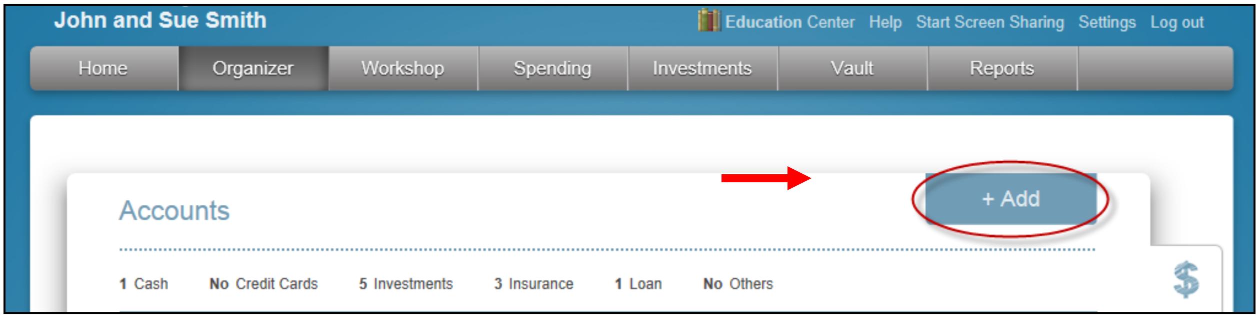
Limited - Advisor has limited access to client's spending details and can view only the categories regarding the spending and budget:

Full access- Advisor can view spending and budgeting items, including transactions.

4. The **Organizer** tab gives your client a place to enter their data, provided the Advisor has enabled this feature for the client.

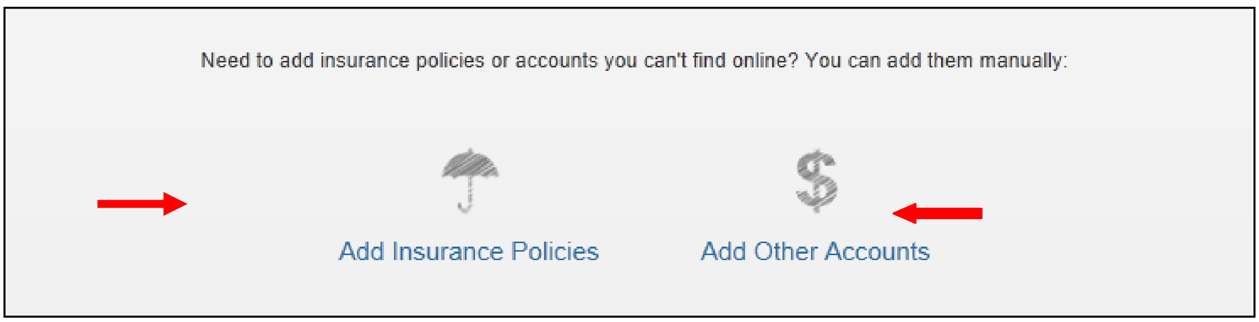
Note: Please refer to the supplements titled Managing Client Ability to Update Personal Data - New Client Site and Managing the Client Website.

5. To add their connections, the client will go to the **Organizer** tab and click on **Accounts** and then click **Add** to search for an institution by name or website address.



Note: For more information on connecting accounts see the **Client Website Connection Guide.**

6. To **manually** enter data, select from the appropriate categories.

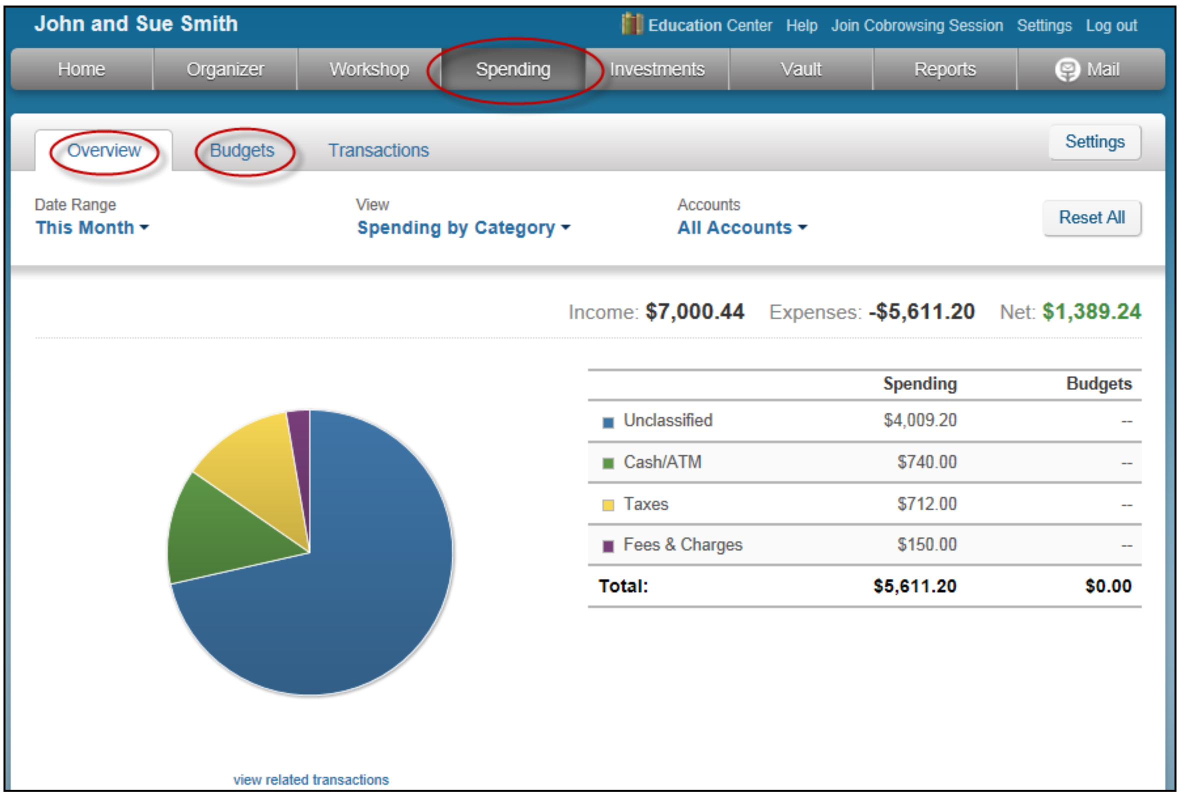


7. The **Workshop** tab allows your client to analyze if they are saving enough for retirement or a college expense as well as analyze their life insurance needs. Clients can also check to see if their finances are balanced and if their investments are properly allocated. Your client can follow the tour guide to walk them through these exercises.

8. The **Spending** tab allows your client to track their spending habits and build a custom budget.

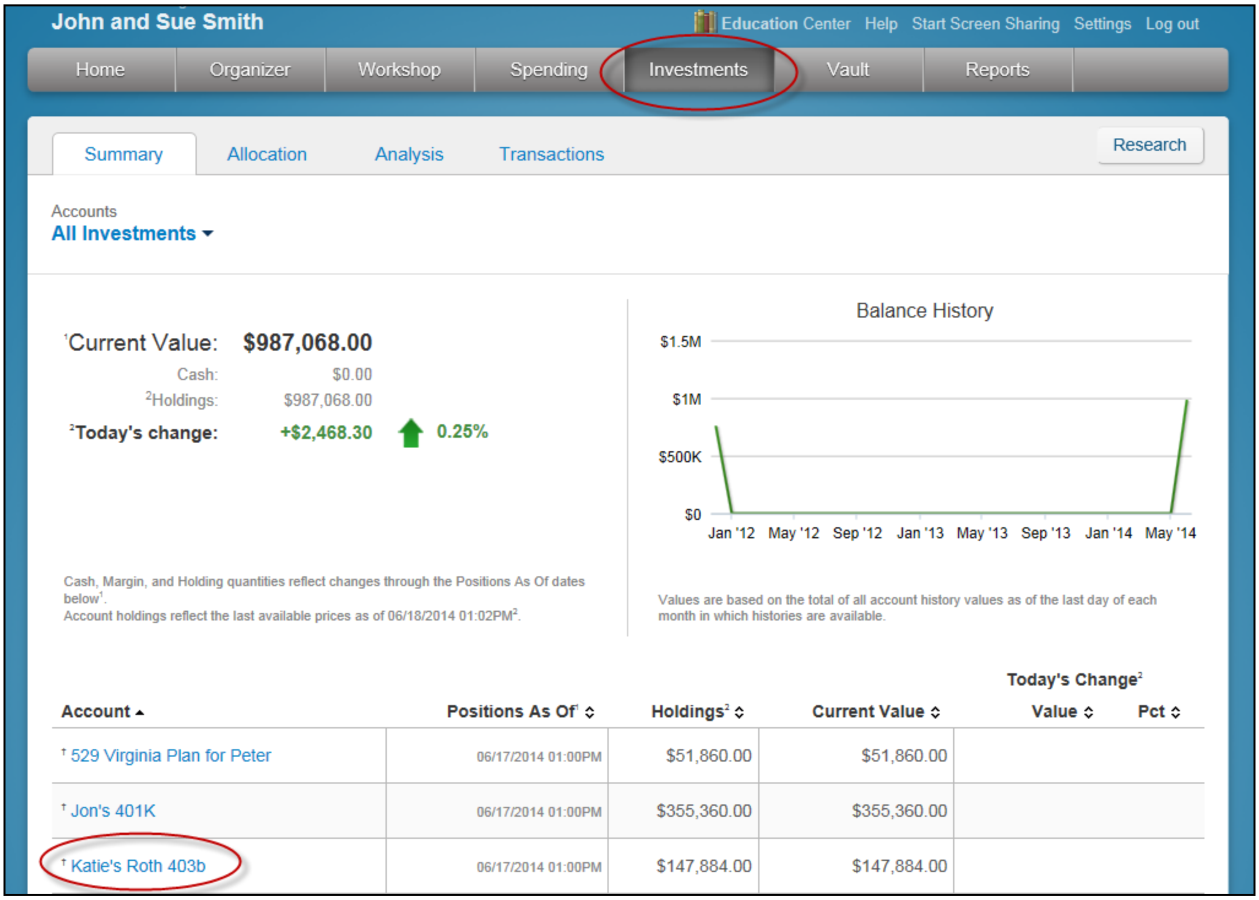
   a. The **Overview** tab provides a pie chart based off of recent transactions imported from aggregated accounts.

   b. The **Budget** window is a snapshot that allows them to monitor if they are on track with their monthly budget.



Note: For detailed information on how the budgeting & transaction features work, please refer to the **Client Site Budgeting** user guide.

9. The **Investments** tab allows your client to view up to date market information based off of any connected investments.

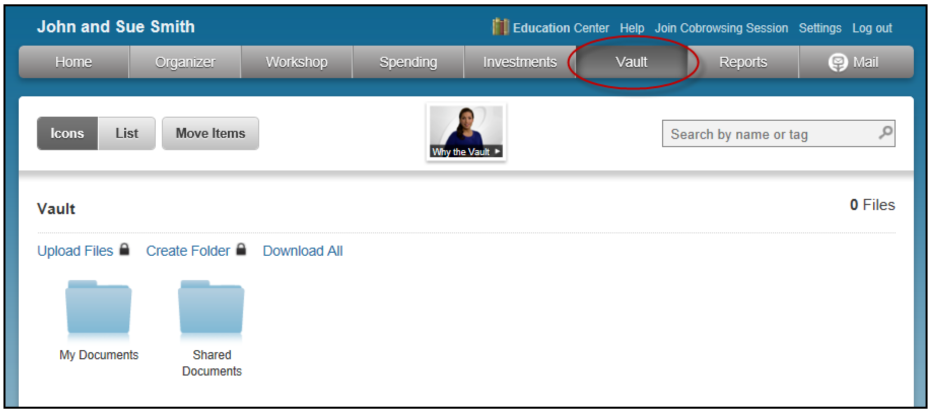


10. Click on the **Account Name** to see a holdings breakdown of a given account.

Symbol	Description	Quantity	Price	Value	Today's Change Value	Today's Change Pct
FBNDX	FIDELITY INVESTMENT GRADE BOND FUND	13,400.00	$7.86	$105,324.00		
FCSSX	Fidelity Series Commodity Strategy Fd	3,000.00	$8.44	$25,320.00		
FIVFX	FIDELITY AGGRESSIVE INTERNATIONAL FUND	1,000.00	$17.24	$17,240.00		

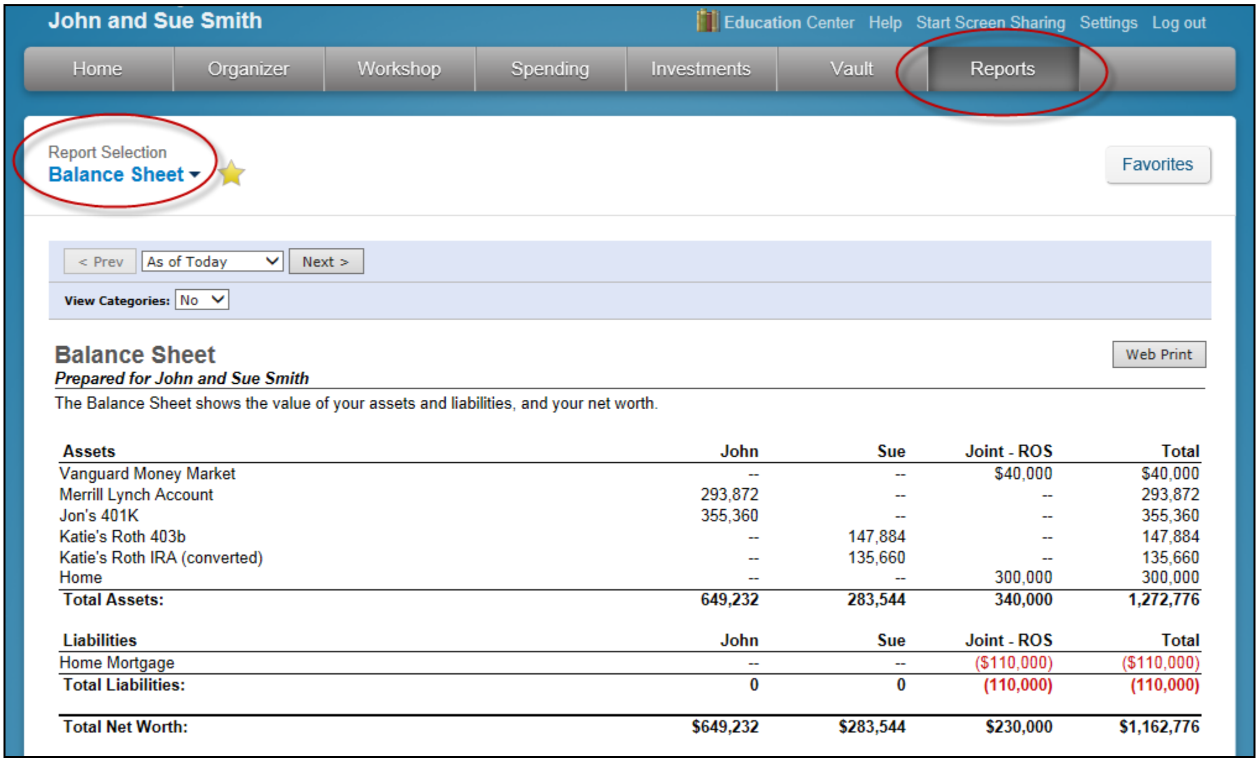
11. The **Vault** provides secure storage for your client's valuable personal documents (**wills, trusts, insurance documents, passports, etc.**) in electronic format.

a. Your client can upload documents into the **Shared Documents** folder, which allows the Advisor to also view the contents.
b. Your client can upload documents into the **My Documents** folder which is a private folder where only *your client's access* can view the contents.



Note: The Vault allows the upload of these types of files: aifc, aiff, aif, au, avi, bmp, doc, gif, jpg, jpeg, mov, mp3, mpeg, mpg, pdf, png, ppt, ps, rtf, snd, swf, tax, tif, tiff, txt, wav, wma, wmv, wps, xls, and xml.

12. The **Reports** tab provides your client with a series of statements about their financial situation. To view a report, your client would simply choose from the drop down list located under Report Selection. The only reports they will see are the ones you allowed them to see when you set up their client site.



Balance Sheet

Prepared for John and Sue Smith

The Balance Sheet shows the value of your assets and liabilities, and your net worth.

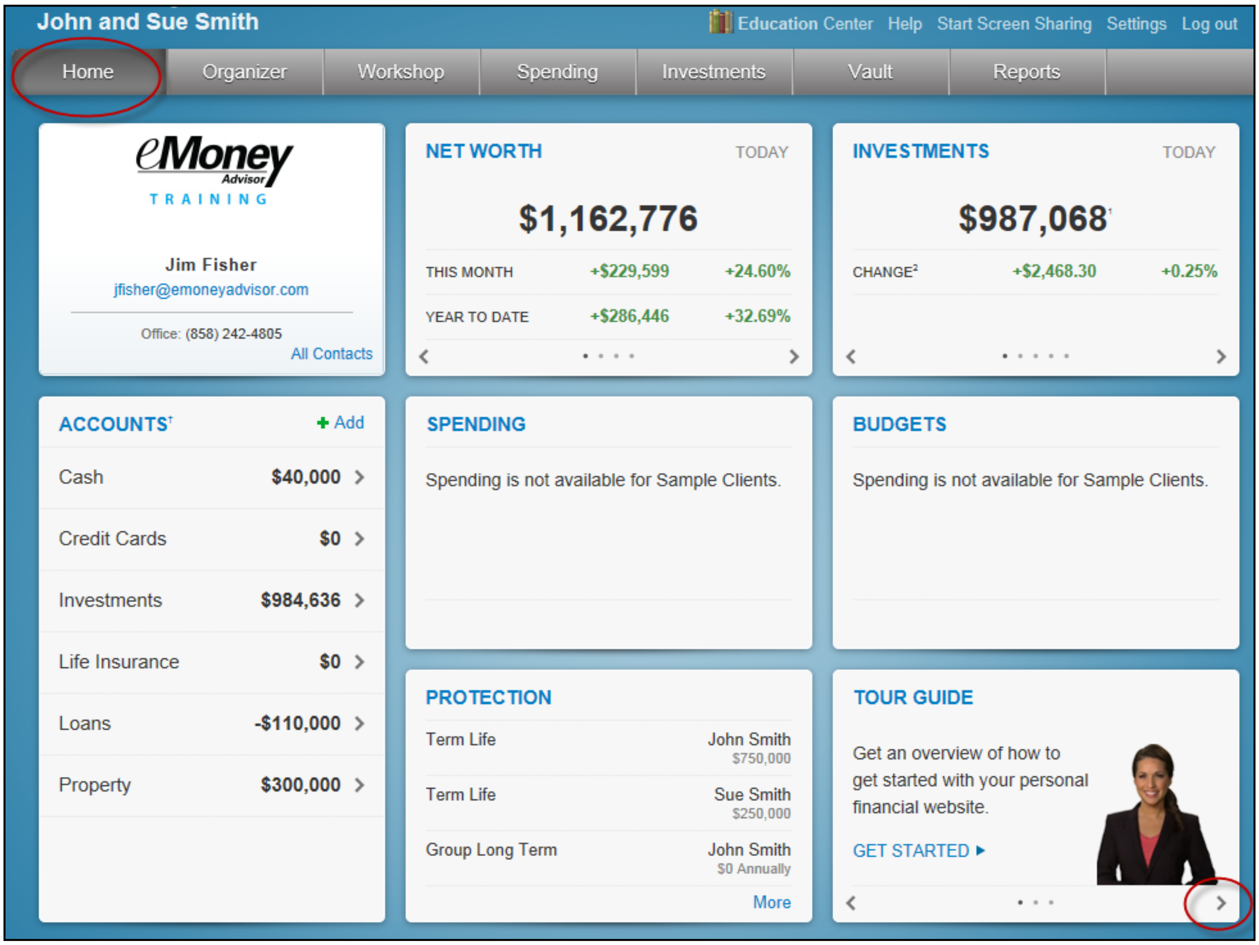
Assets	John	Sue	Joint - ROS	Total
Vanguard Money Market	--	--	$40,000	$40,000
Merrill Lynch Account	293,872	--	--	293,872
Jon's 401K	355,360	--	--	355,360
Katie's Roth 403b	--	147,884	--	147,884
Katie's Roth IRA (converted)	--	135,660	--	135,660
Home	--	--	300,000	300,000
Total Assets:	**649,232**	**283,544**	**340,000**	**1,272,776**

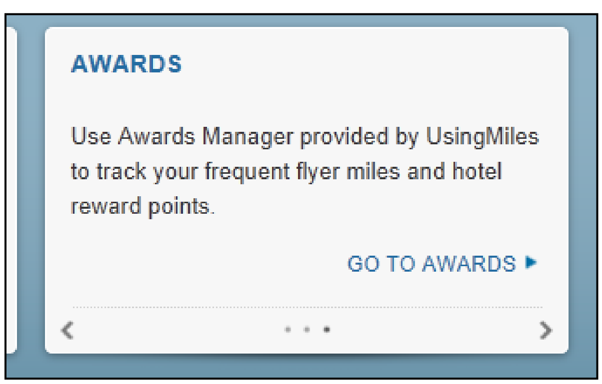
Liabilities	John	Sue	Joint - ROS	Total
Home Mortgage	--	--	($110,000)	($110,000)
Total Liabilities:	**0**	**0**	**(110,000)**	**(110,000)**
Total Net Worth:	**$649,232**	**$283,544**	**$230,000**	**$1,162,776**

13. The **Awards** tab is a free service that allows your client to track Frequent Flyer miles, Hotel Award points, Credit Card Awards, and other points programs.

    a. By signing up for access your client can track their awards on the web. They can also receive statements & alerts via-email.

    b. To enroll, your client would go to the Home page and scroll through the tiles at the bottom right side of page until they see **AWARDS.** Click **GO TO AWARDS.**





14. The client has access to their own **Alerts** on the client website. By clicking on the Settings link on the top right hand side of the screen, it will bring the client to the Alerts set up page. They will be able to pick and choose between many different types of alerts to turn on and off.