

FAQs

Getting Started

CAN THE SITE NOTIFY ME OF MAJOR CHANGES TO MY FINANCIAL ACCOUNTS?

Yes – your Personal Financial Website can alert you via web and email of large deposits, withdrawals, low balances, fees and more. Customize your Alerts by going to **Settings – Alerts**.

HOW DO I SET UP THE MOBILE WEBSITE?

After you register for your Personal Financial Management website, you will be sent a confirmation email with your username and a link to access the site via your mobile device. Open this email on your mobile device and click on the link. Then click the **"Add to Home Screen"** button, or create a mobile bookmark for quick access.

HOW DO I CHANGE MY PASSWORD OR SECURITY QUESTIONS?

Forgotten passwords can be changed by clicking **Forgot Your Password?** on your login screen. If you'd like to change your password or security questions, select **Settings – Security**.

WHAT ARE TASKS?

Tasks are an easy way for your advisor to let you know that something requires your attention in your Personal Financial Website. Tasks work like an online to-do list. Your advisor can assign you a task (such as uploading an important financial document to the Vault before a meeting) and you can instantly notify your advisor once you've completed the request.

WHAT CAN BE UPDATED IN MY SETTINGS?

In the **Settings** tab located on the top right of your website, you can make changes to your Alerts, Security, and Privacy settings.

HOW SECURE IS MY FINANCIAL DATA ON THIS SITE?

Your wealth management system employs advanced security features and protocols to keep your data safe, private, and secure at every hour of every day. Our comprehensive security measures include password protection, Secure Socket Layer encryption, firewalls, intrusion detection, audits, inspections, and more. For more information, click **Security** in the footer of your website.

HOW CAN I JOIN A SCREEN SHARING SESSION?

To collaborate with your advisor in real time, click the **Screen Sharing** link at the bottom right footer and provide your advisor with the session code. If your advisor initiated the session, simply enter the code provided.

The Organizer

HOW DO I ADD MY BANK ACCOUNTS, CREDIT CARDS, AND OTHER FINANCIAL ACCOUNTS TO THIS SYSTEM?

To add your financial accounts, or **"Connections,"** follow the steps below:

- On your Client Site homepage, click **+Add Account** next to **Accounts**
- If you have an online login, select **I have an online login to this account**
- Enter the name of your financial institution into the text box and click **Search**
- Select the account from the search results and follow the steps to connect

HOW CAN I ADD A PICTURE TO THE PEOPLE AND THINGS IN MY ORGANIZER?

From the Organizer, simply click on the person or thing for which you want to add a picture, and you'll be prompted to upload an image.

Spending & Budgeting

CAN MY WEBSITE CREATE A BUDGET AUTOMATICALLY BASED ON MY SPENDING HABITS?

Yes, you have the option to create your own budget manually or to create an auto-budget using the last 6 months of spending data.

CAN I CHANGE A TRANSACTION THAT IS CLASSIFIED INCORRECTLY?

Our system automatically assigns spending categories to your transactions. If the site has misinterpreted your purchase, you can change the category it's assigned to by navigating to the **Transactions** tab under **Spending**.

Click on the transaction and use the drop down menu to adjust the category.

To change all instances of this transaction type moving forward, create a rule by clicking on the **Details** tab underneath the selected transaction. This allows you to rename and reclassify all matching transactions automatically.

CAN MY ADVISOR SEE MY ACCOUNT ACTIVITY?

You have the option of providing your advisor with no spending data, category-only data, or the full view of all data. You can control the privacy of your website under **Settings - Privacy - Spending Permissions**.

Investments

WHAT TYPE OF INVESTMENT INFORMATION CAN I SEE ON MY WEBSITE?

Your website provides a summary of your entire portfolio as well as a more detailed look into your individual accounts. Account Details include individual holdings, value, asset types, net change in value over time, and transaction history.

CAN I CHANGE MY ASSET ALLOCATION OR CONTRIBUTIONS?

No, for your security, your Personal Financial Management site is non-transactional. Unlike online banking, trading or shopping websites, your money cannot be moved, withdrawn or accessed on our system.

The Vault

HOW DO I ADD A DOCUMENT TO THE VAULT?

To add one or multiple documents to your Vault, simply drag and drop the files from your computer into the desired folder.

WHAT SHOULD I UPLOAD TO MY VAULT?

Your Vault is a secure, easy way to store, organize, and access all your most important documents, like legal documents, medical records, insurance policies, tax information and more. In addition, your advisor can recommend specific documents to upload. To find suggested documents, simply go to the Organizer and click into the fact to view any suggested documents.