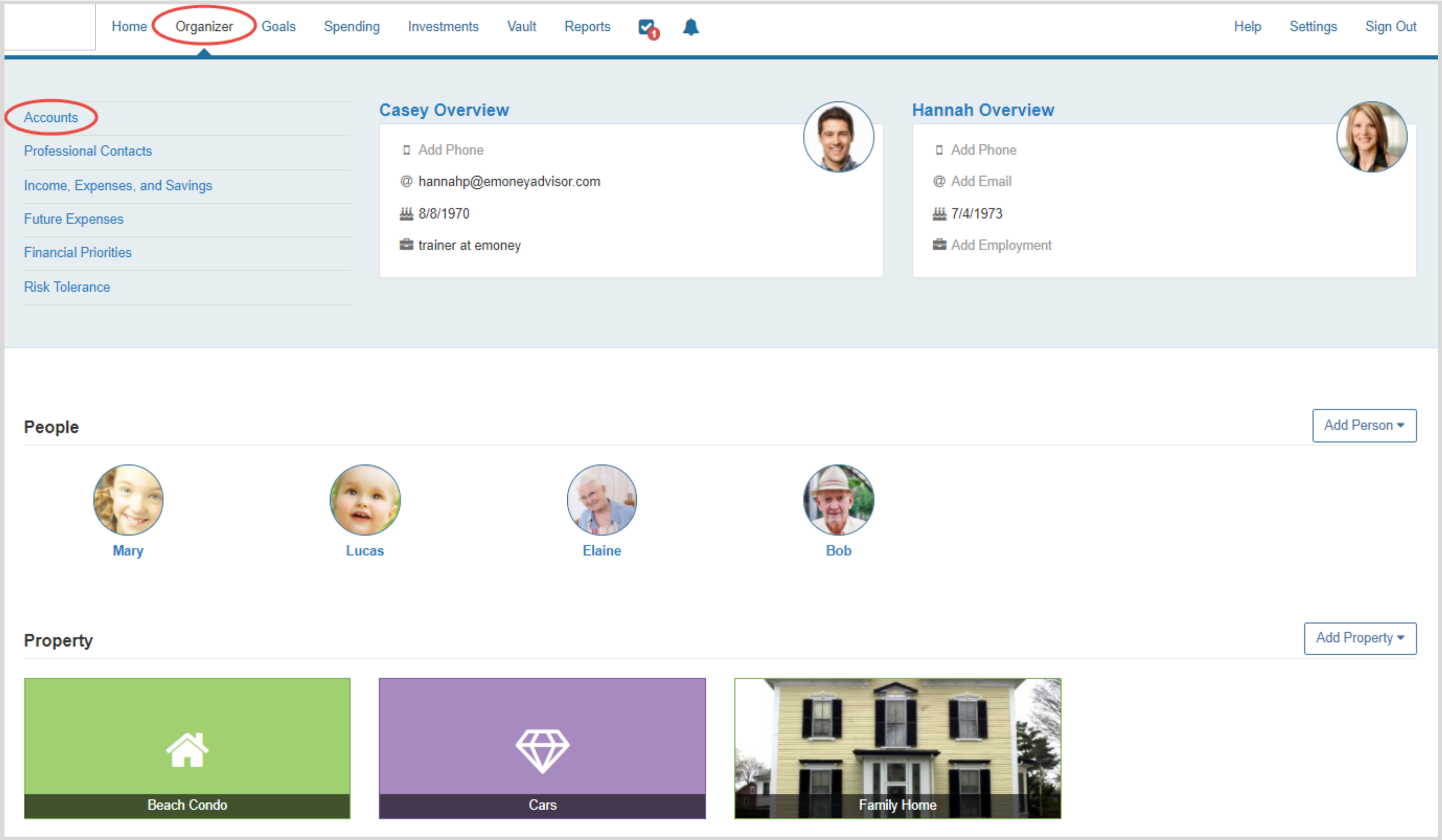
Troubleshooting Accounts

In this guide, we will walk you through basic troubleshooting steps you can take to correct any of your connected accounts with errors. Unless noted by the institution, values should update nightly but errors can occur from time to time for different reasons. To keep your website up to date, we recommend logging in regularly to maintain all connections! If you are still experiencing errors, please reach out to our team for further troubleshooting efforts.

Common Errors & Troubleshooting Tips

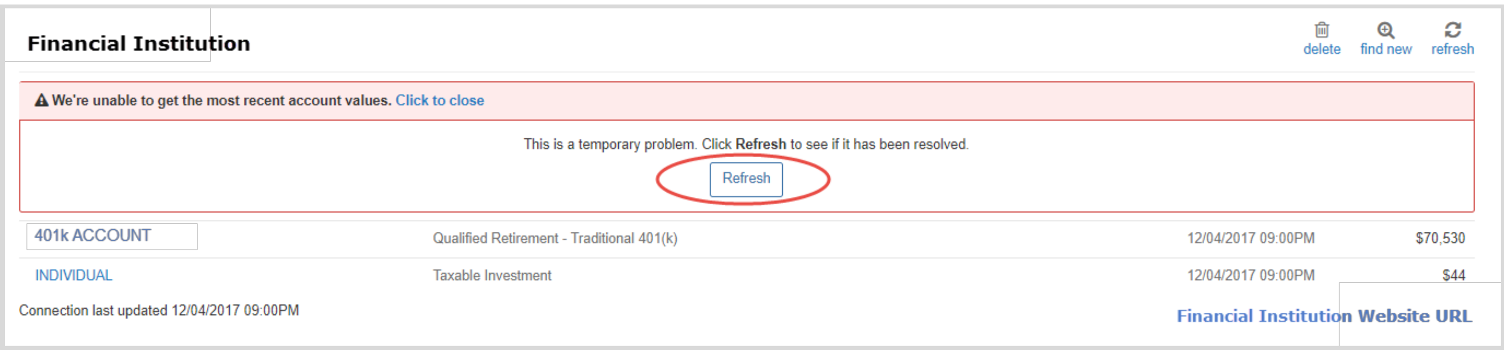
Your accounts are easily accessible from your **Organizer**. Once in your Organizer, click **Accounts** to see a summary of all accounts entered in the system both by you and your financial representative.



Troubleshooting Accounts

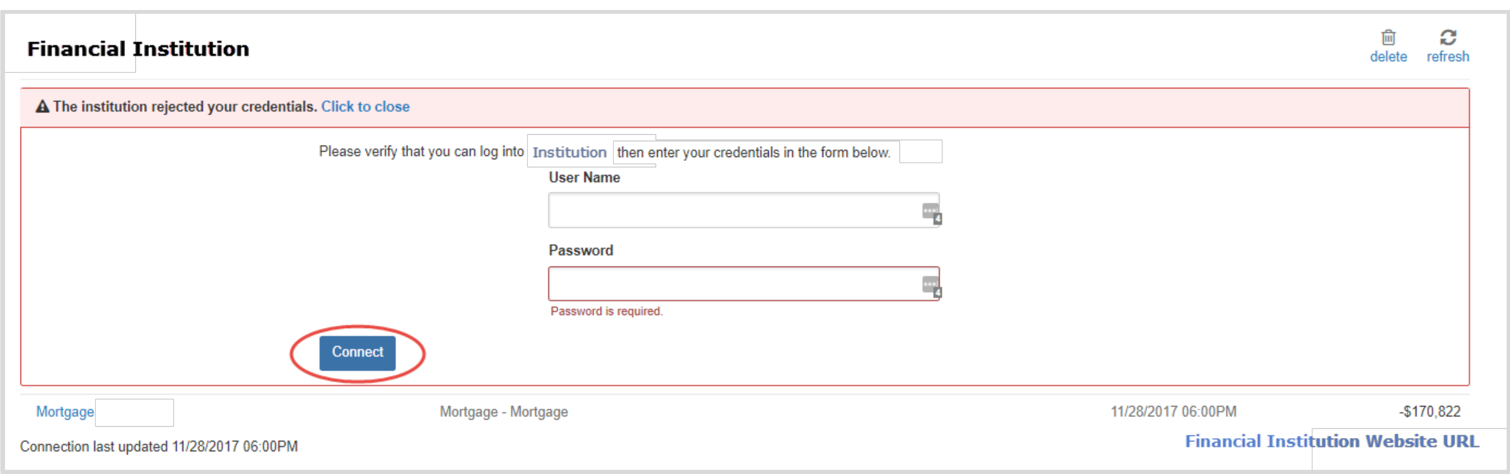
Unable to get the most recent account values

In the notification bar, click the link that says Click to Fix. Next, click the Refresh icon. This will refresh the entire connection and pull the most recent account values. If the refresh does not fix the error, contact our team for further troubleshooting options.



The institution rejected your credentials

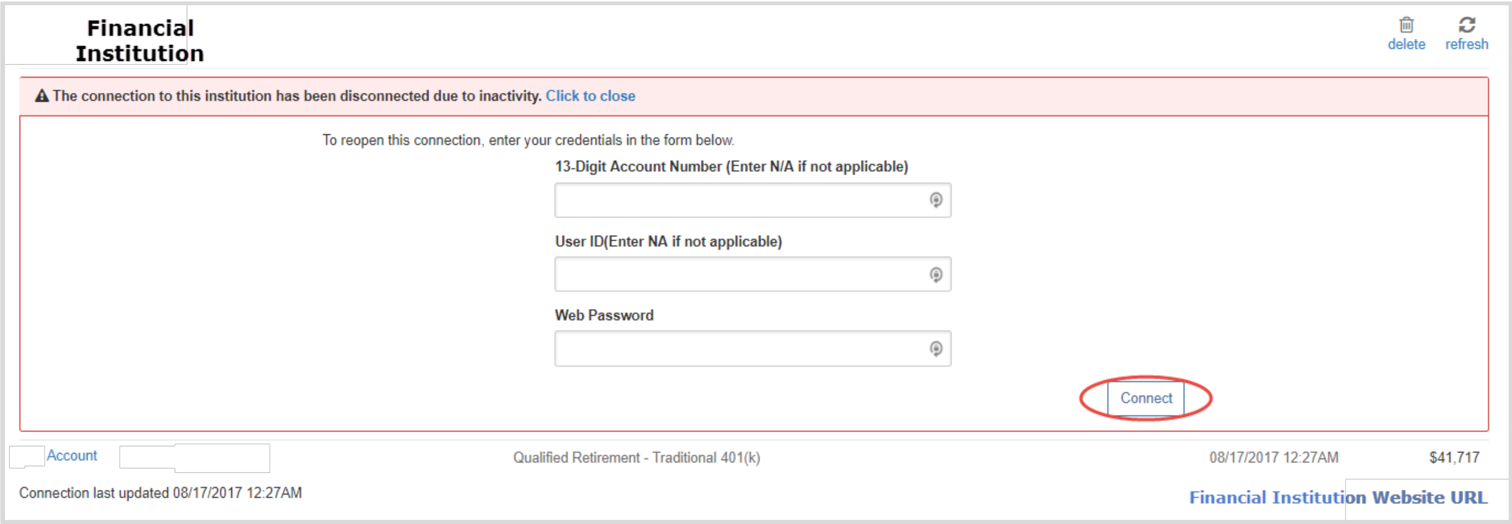
This error occurs when attempting to connect to the institution and the credentials are rejected by the institution. Click the banner to fix. First, confirm you can log in to the institution directly by clicking the institution name. A new browser tab will open for you to confirm your credentials. If they work, navigate back to your wealth management site and re-enter your credentials and click Connect.



Troubleshooting Accounts

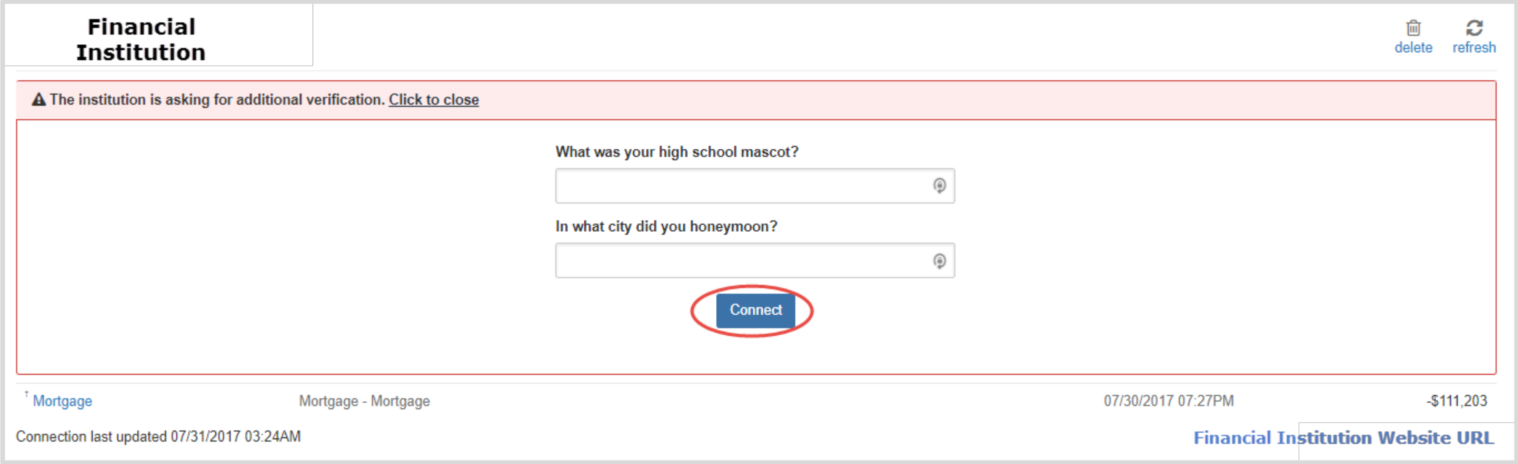
Connection to this institution has been disconnected due to inactivity

If your connection has required attention after a period of 30-days, it will become disconnected. Your history will not be deleted, but the system will no longer attempt to update account values. Click to fix and enter the required information.



The institution is asking for additional verification

The institution is prompting for additional verification. These prompts come directly from the financial institution. Confirm on their website that your answers are correct then click Connect.



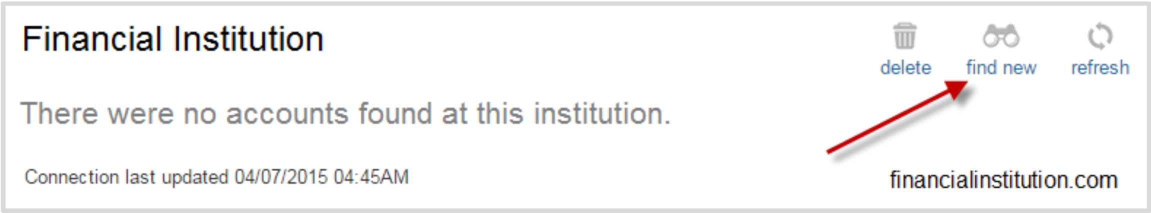
Troubleshooting Accounts

This connection needs attention

Click the Institution URL. This will open the institution log on page in a new browser tab. Confirm that you can log in using that specific site. If credentials are auto saved, make sure to manually type them in to confirm that the credentials you supplied on your wealth management site will work on the institution site.

No accounts found at the institution

Sometimes accounts are not immediately recognized. Click the binoculars icon to find new accounts. This will refresh with any accounts available at the institution.



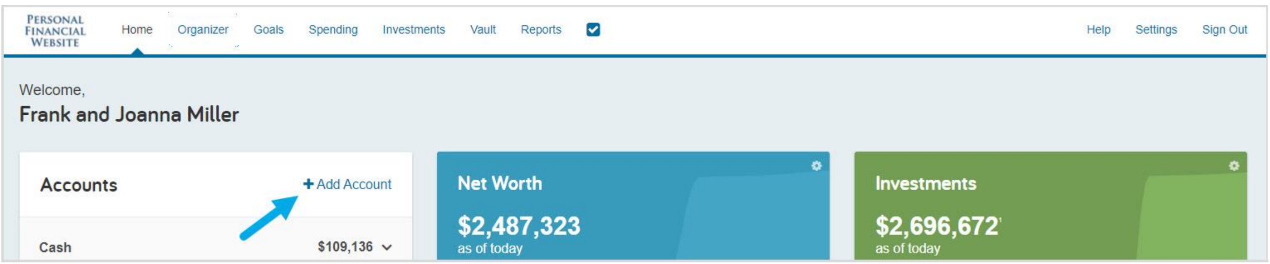
Add Accounts

This user guide will demonstrate how to add connected and manual accounts.

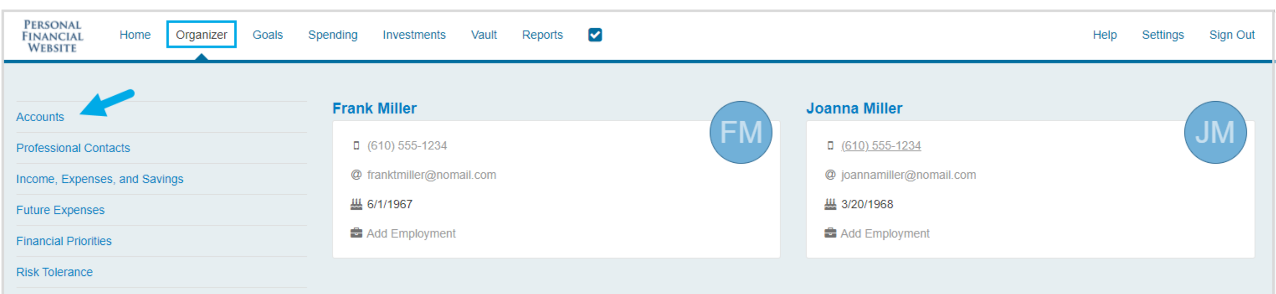
Establishing connections to your personal banking institutions will allow your account information to be updated automatically. You can enter your accounts manually if you do not have an online login to an institution. While manual accounts do NOT update, they help build a better financial snapshot for you and your Advisor.

Adding Connected Accounts

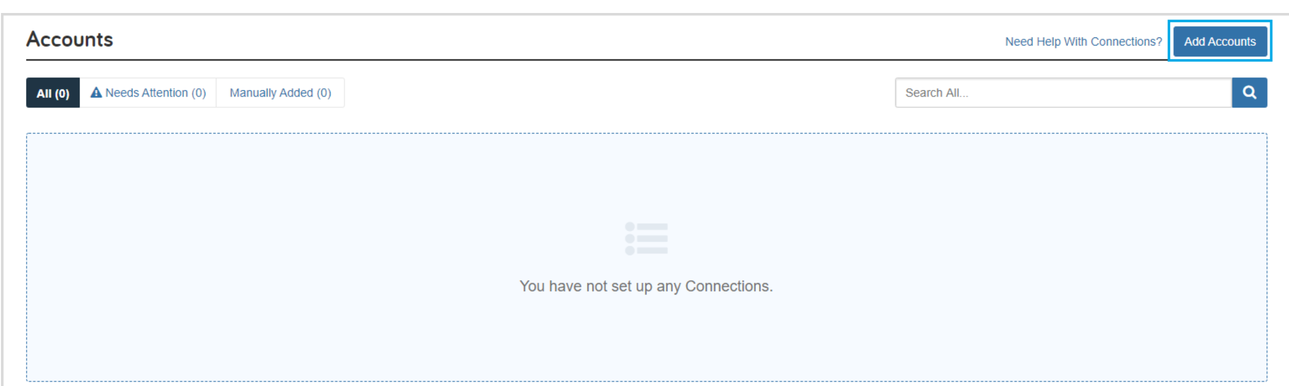
1. From your Home page, click **Add Account**.



You can also click **Organizer** on the menu, then click **Accounts**.

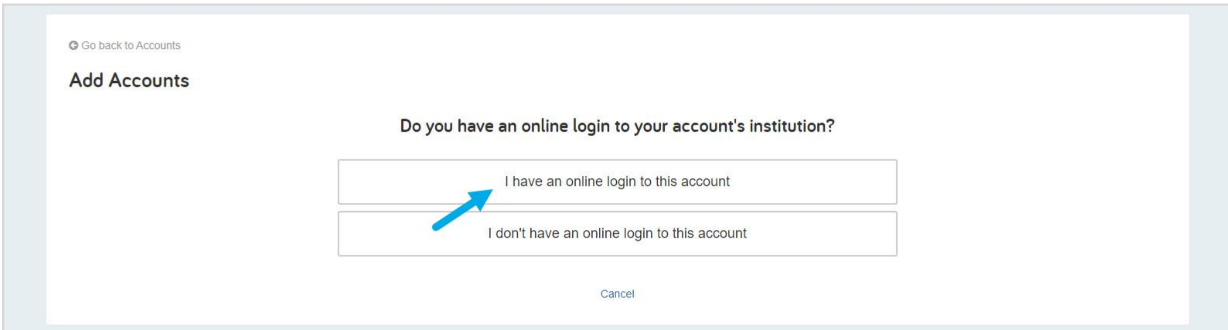


2. Click **Add Accounts**.

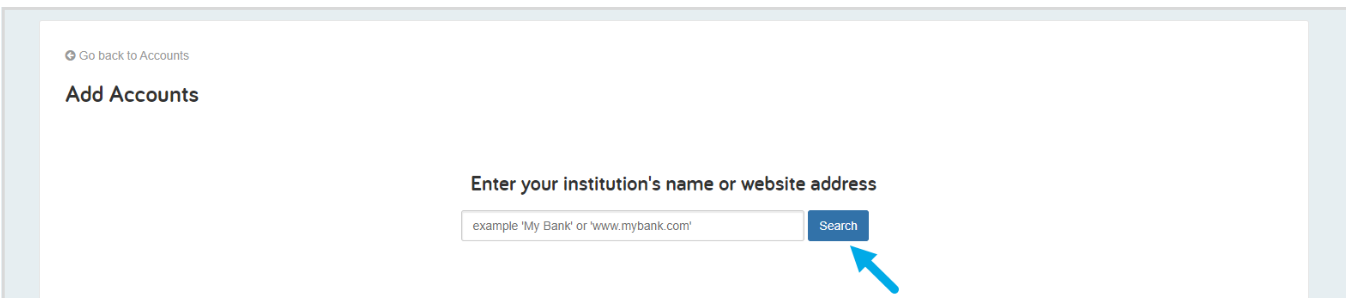


Add Accounts

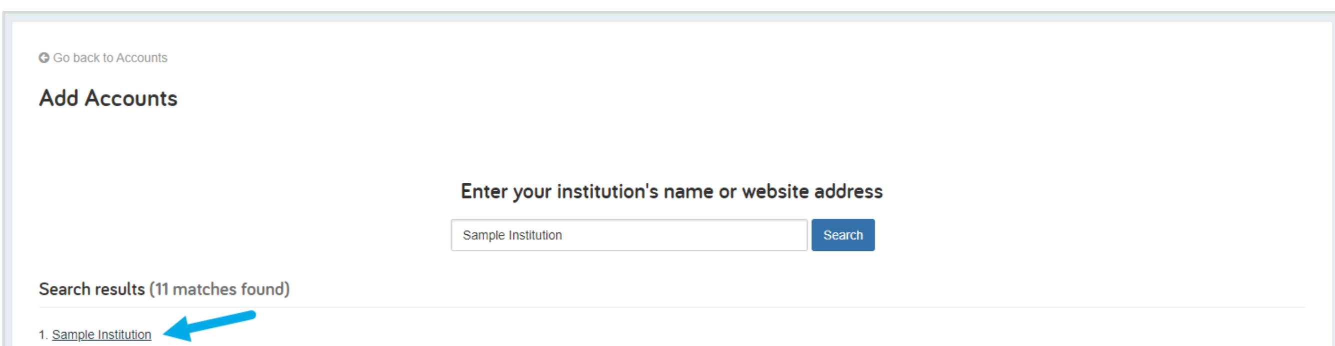
3. Click **I have an online login to this account**. (Manual entry is explained in the next section.)



4. Enter the name of the institution or website address, then click **Search**.



5. Select the connection from the search returns.

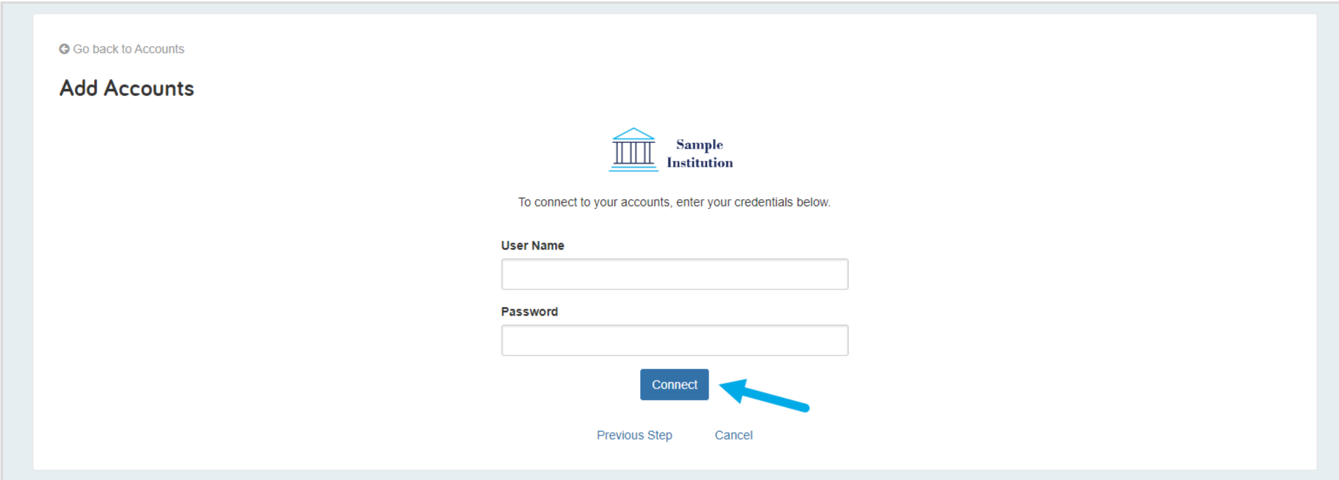


6. If an Acknowledge Institution Notice screen appears, read the notice and click **Continue**.

   This notice varies by institution and will inform you of any critical information related to this institution's connection.

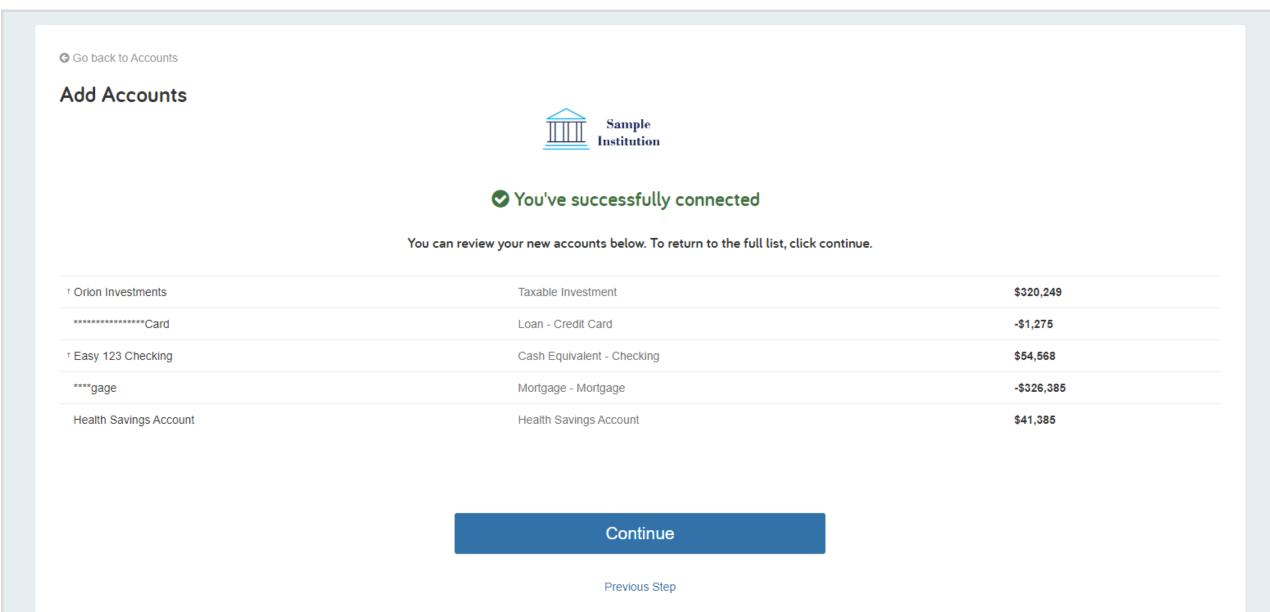
Add Accounts

7. Enter your login credentials for this institution and click **Connect**.



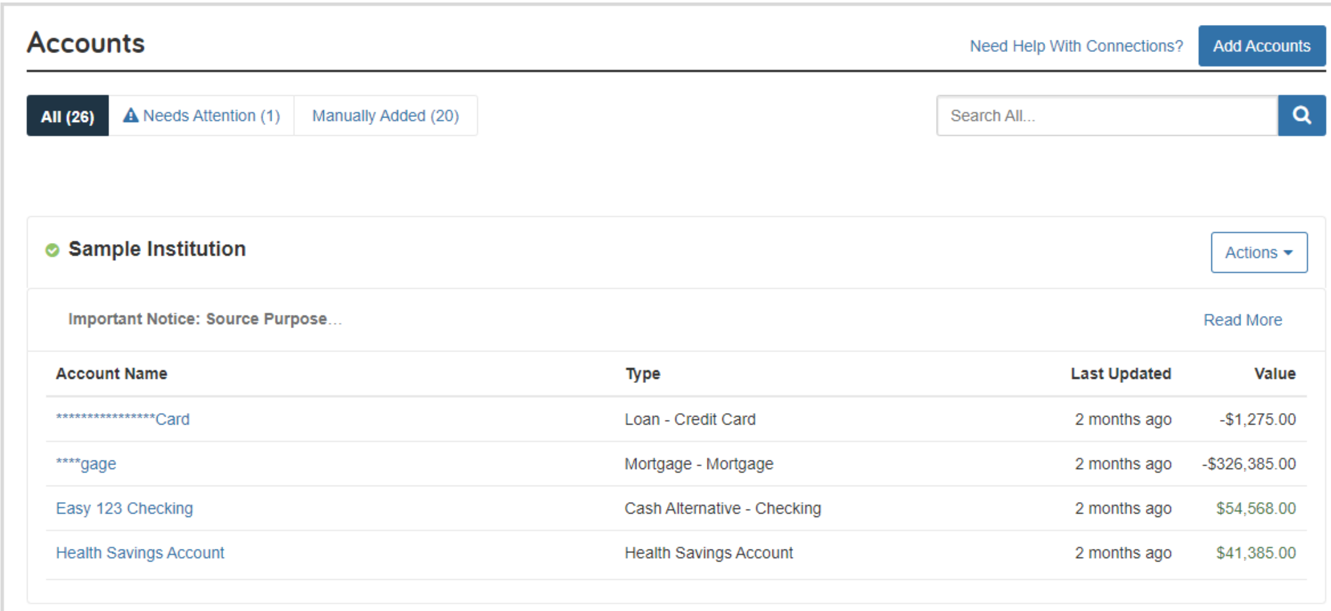
If there is an issue connecting to your accounts, you will receive a status message describing the problem, and you can click on the message to learn how to fix it.

8. Once your credentials have been verified, you can review the accounts brought over through the connection. Click **Continue** to return to an overview of all accounts you have entered into your portal.



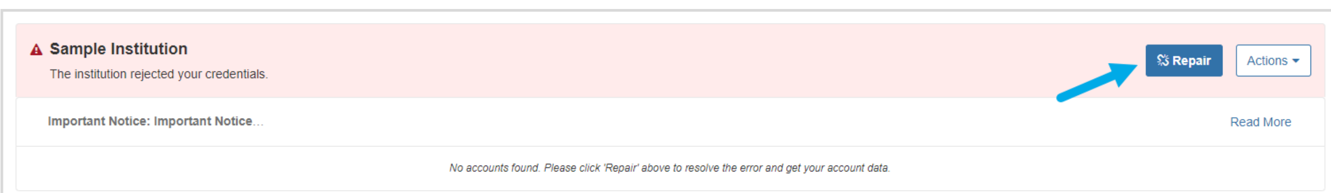
Add Accounts

9. On the Accounts page, you can easily see when your accounts with an institution last updated or if any accounts are in an error state.

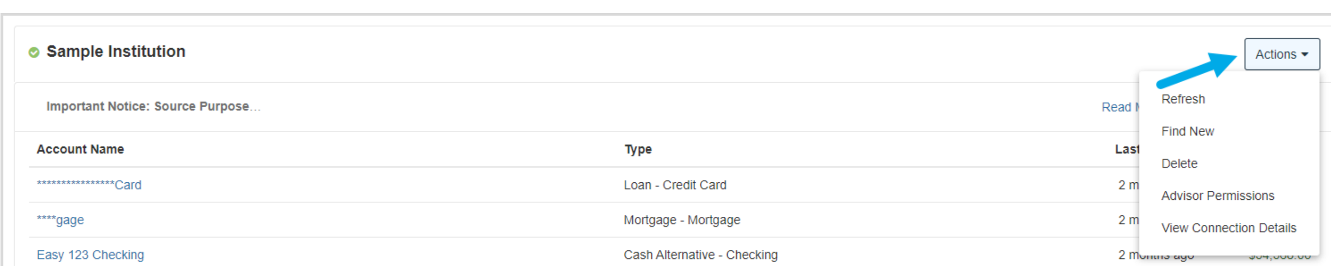


10. Each connection you establish will have its required maintenance. For example, if you updated your password at the institution, you will need to update the credentials on the connection in your portal.

    Errors that you can repair will appear with a **Repair** button that you can click to fix the issue.

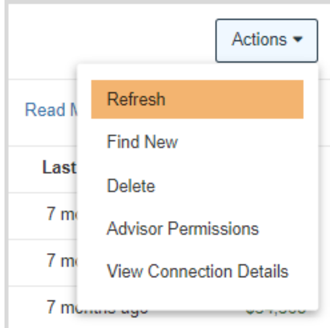


    With the **Actions** menu, you can make a handful of selections to manage your Connections:

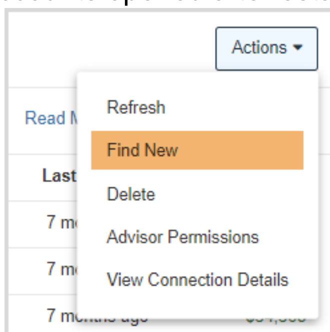


Add Accounts

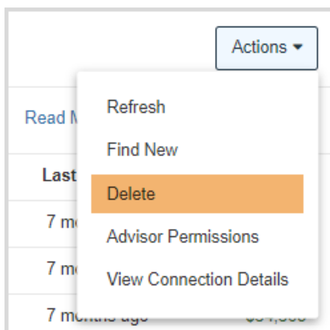
1. **Refresh** the connection anytime to pull over updated account values manually.



2. Select **Find New** to pull any new accounts opened after establishing the Connection.



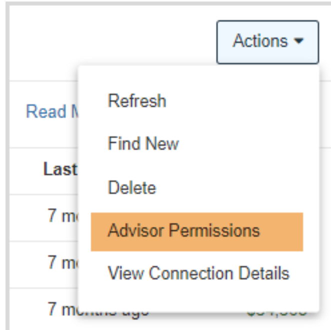
3. Select **Delete** to remove the connection and all associated accounts.

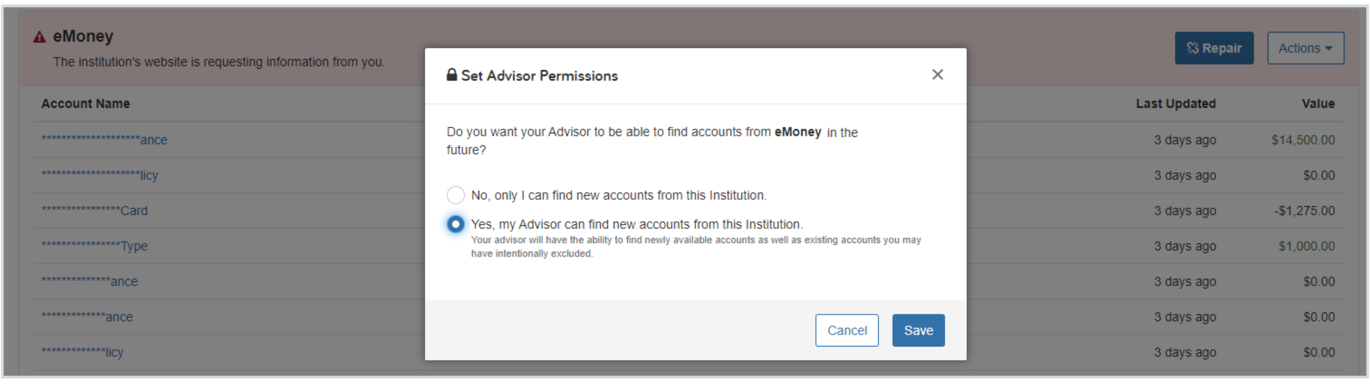


Note: If you **Delete** the Connection, you will lose all accounts and transaction history. This is not recommended unless the connection and its accounts are no longer needed.

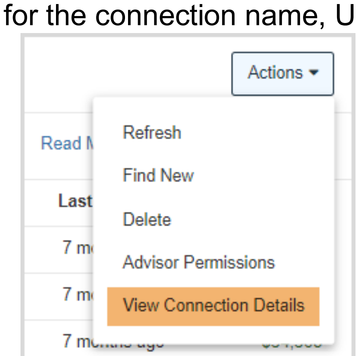
Add Accounts

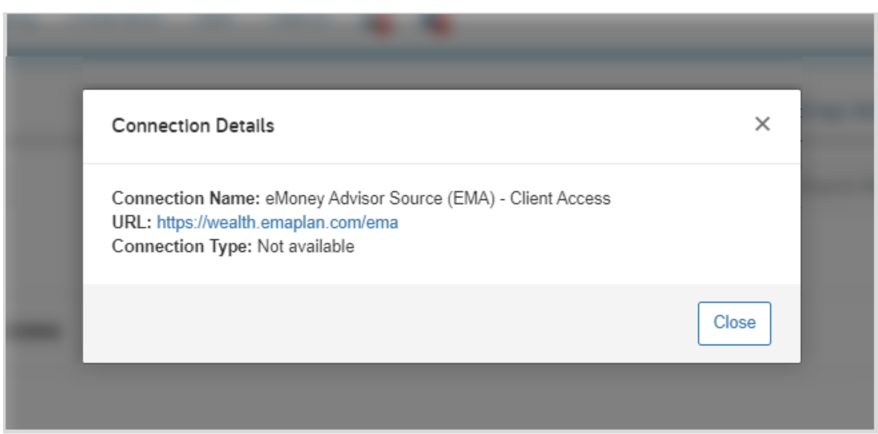
4. The **Advisor Permissions** selection displays a popup that allows you to enable your Advisor to **Find New** accounts on your behalf.





5. Select **View Connection Details** for the connection name, URL, and Connection Type.



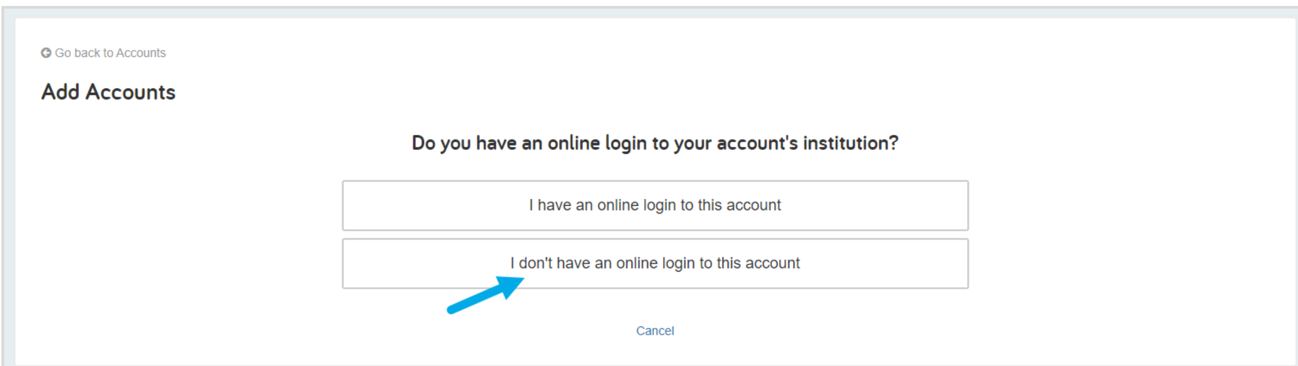


Add Accounts

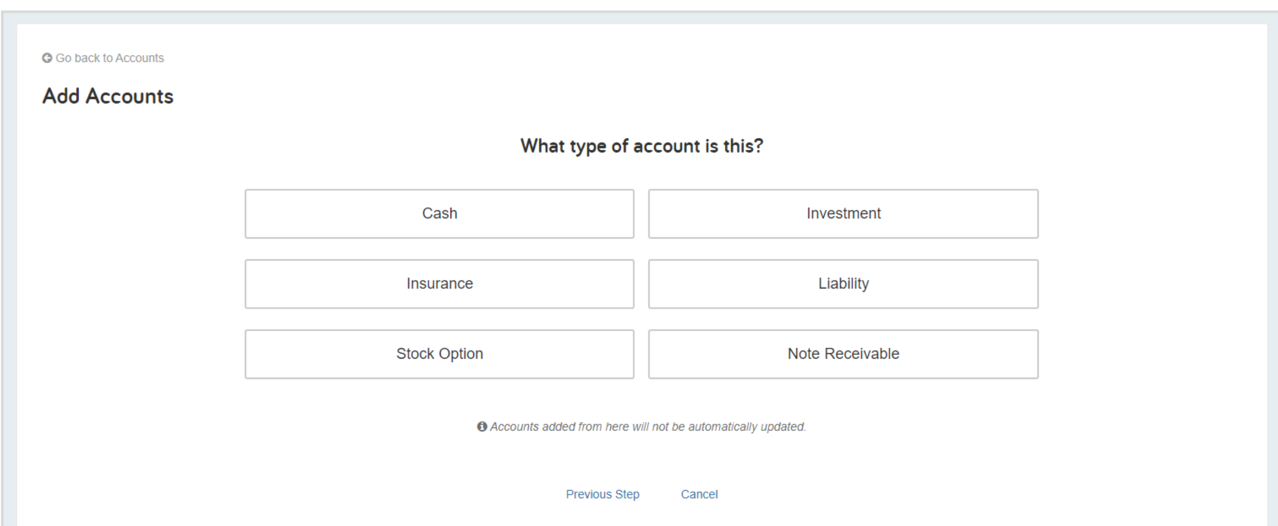
Adding Manual Accounts

1. Click **Add Accounts** on the Accounts page.

2. Click **I don't have an online login to this account**.

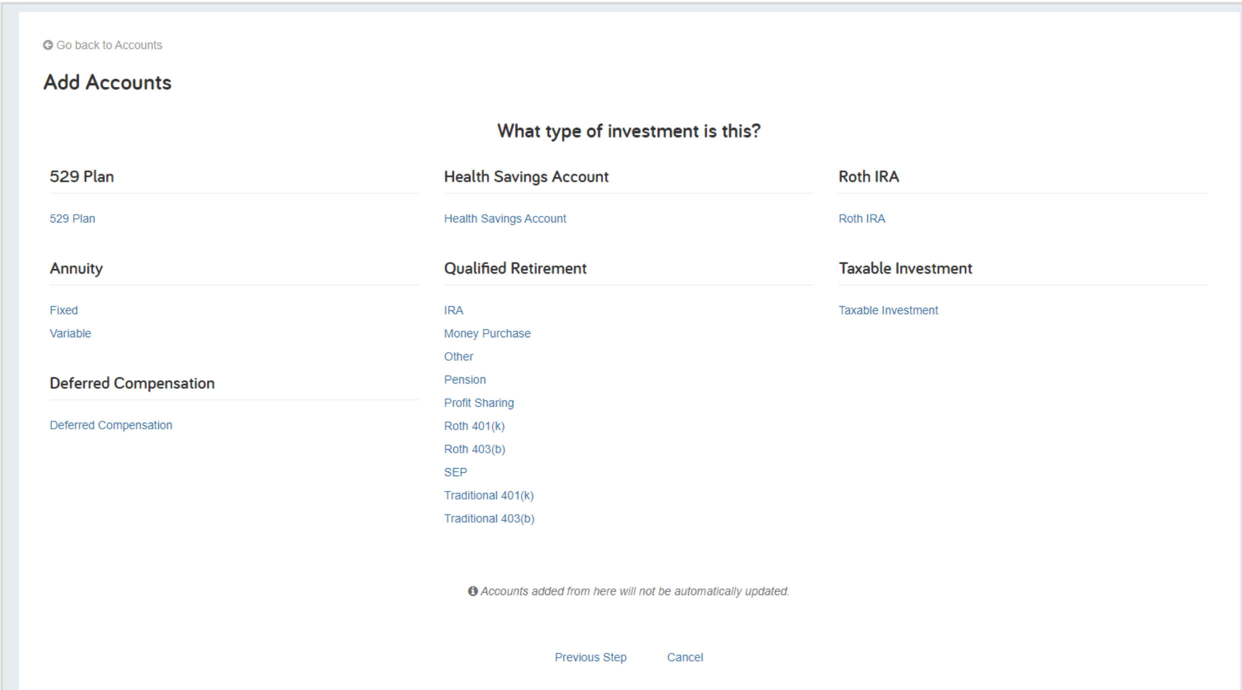


3. Select the type of account.

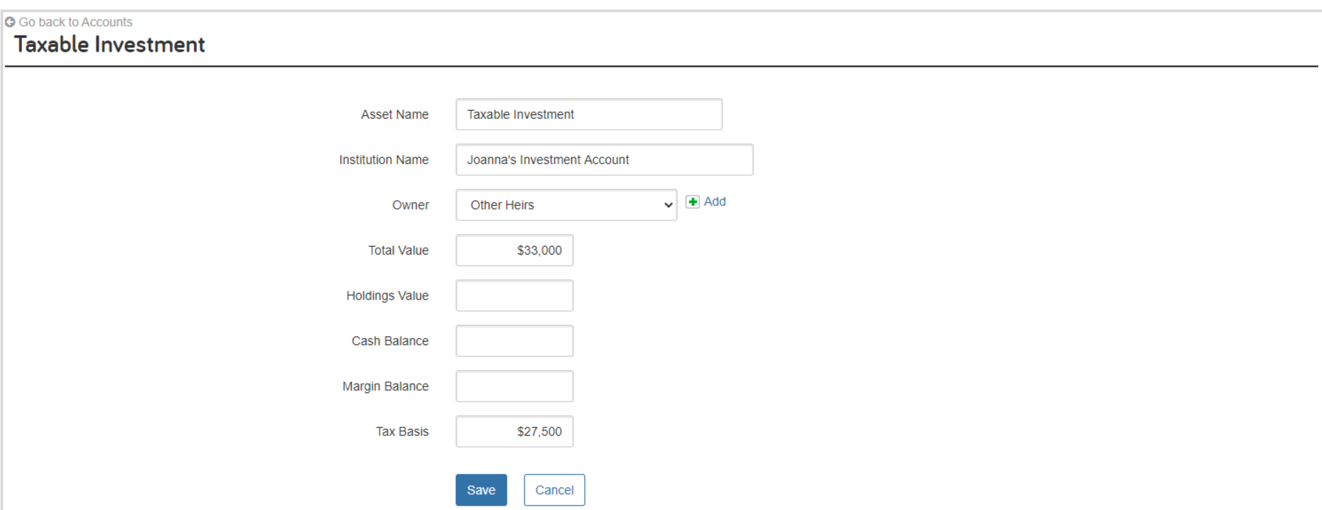


Add Accounts

4. Then, click the more specific type of account.



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



YOUR PERSONAL FINANCE WEBSITE

A Guide to Getting Started

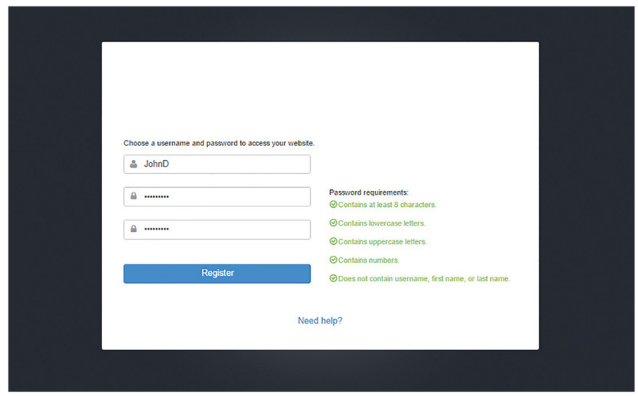
Manage your wealth and your well-being

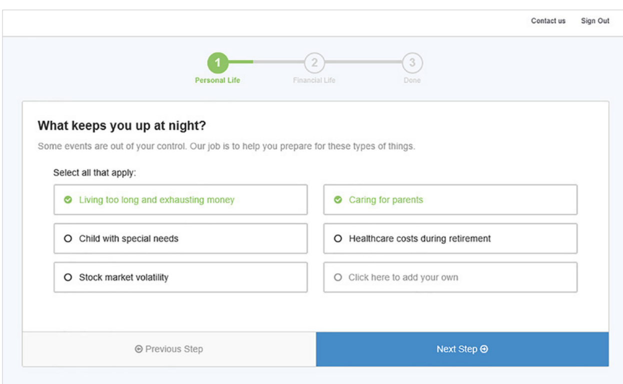
Your Personal Financial Website helps you see your financial life beyond the numbers. And with our automated fact finding questionnaire, you can get started with your Personal Financial Website on your own in just a few easy steps.

STEP 1

Register for your financial website

Click the link sent to your inbox to get started. Then, create your own secure user name and password.





STEP 2

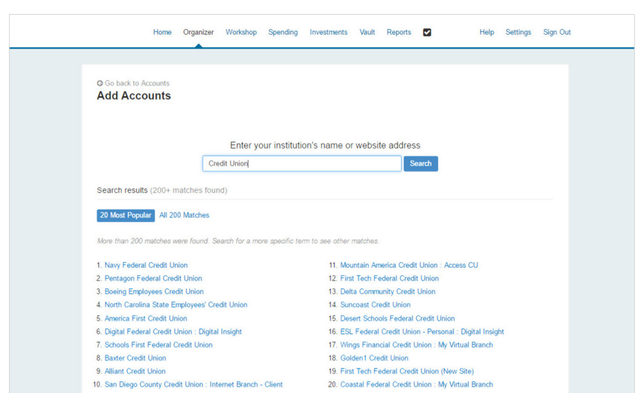
Complete the series of introductory questions

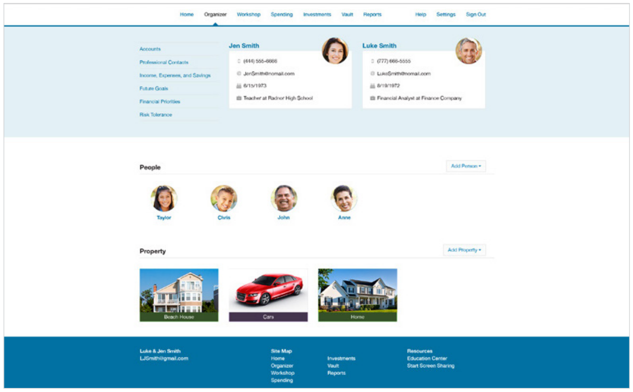
Answer a few basic questions to help us understand your current finances and future goals.

STEP 3

Connect your financial accounts

From your Homepage, click on Organizer, then Accounts to start adding your financial institutions, like bank and credit accounts.



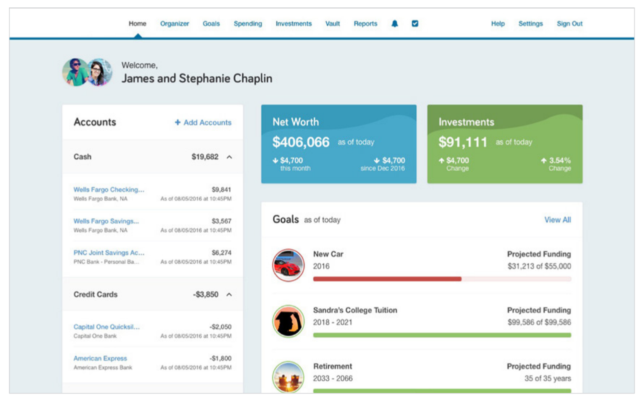


STEP 4
Personalize your website

Customize your website by adding photos of what your wealth represents—the people and things most important in your life.

STEP 5
See your finances come to life

Easily organize and track your financial goals with spending and budgeting tools, investment monitoring, and more.



Now you're ready to start managing your wealth with your personal financial website!

By combining our personal digital experience with the professional guidance only a trusted advisor can provide, we can work together to build and monitor a financial plan that fits your needs.

Safe & Secure

Your wealth management system employs advanced security features and protocols to keep your data safe, private, and secure at every hour of every day, year round.

Our comprehensive security measures include password protection, Secure Socket Layer encryption, firewalls, intrusion detection, audits, inspections, and more.

With each measure in place, you can be confident that your important information is safe and secure.

Password Protection

You have a unique username and password, ensuring that only you can access your information. Submitting incorrect login credentials three consecutive times will automatically lock your account for 10 minutes. This is to block any manual or programmed hacking attempts.

In most cases, we have no access to your username or password. However, if you decide to provide us with this information, we will never share your username and password over the phone or send it to an email address not pre-registered with your account.

Highest Encryption

Our system uses a 256-bit Secure Socket Layer to scramble your data, further preventing access to unauthorized users. This is the highest level of encryption currently available today, and twice the standard followed by many financial institutions, including banks.

Routine Security Testing

Your wealth management system uses third-party security auditors and software, including TraceSecurity, Tenable Security and White Hat Security, to identify vulnerabilities within your system and to assist us with remediation efforts.

2-Factor Authentication

Your wealth management system employs 2-Factor Authentication (2FA), a complete fraud detection platform that uses a dynamic risk- and rules-based approach to identify highrisk behaviors and initiate an additional layer of security. With 2FA, you are sent a verification code to your mobile phone, which you are required to input along with your username and password in order to access your personal financial website. This additional layer of protection safeguards your sensitive financial data and strengthens the security of your account by requiring two methods of verifying your identity.

Non-Transactional

Unlike online banking, trading or shopping websites, your money cannot be moved, withdrawn or accessed on our system.

Desktop Vault Overview

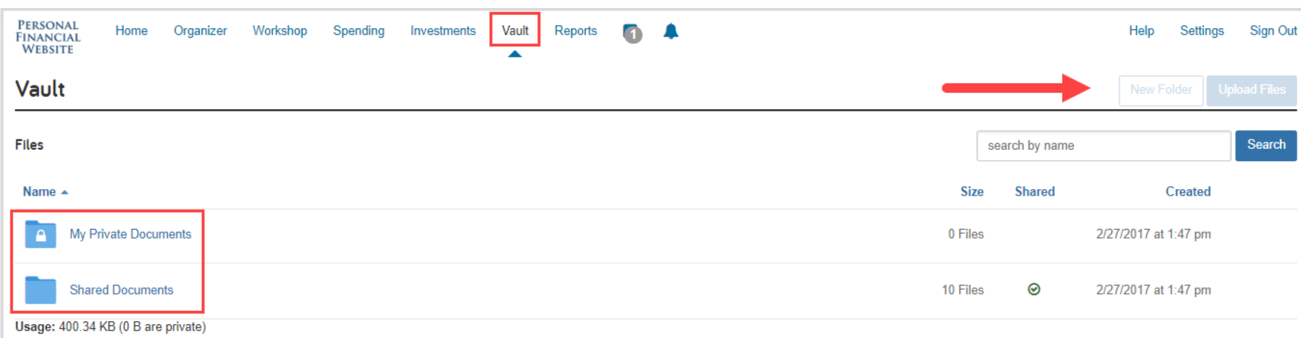
The Vault feature in your Personal Financial Website allows you to store important documents and files safely and securely. This user guide will show you how to navigate and utilize the Vault, including how to upload files from your computer.

Please Note:

- Within your Vault there are two folders you can upload directly into – they are titled **My Private Documents** and **Shared Documents**.
- Most file types are compatible, however .exe (executable) files are not supported.
- The individual file size upload limit is 30MB.

Navigating the Vault

1. Click the **Vault** tab from the top navigation bar. As mentioned above, the two folders you can upload files into are **My Private Documents** and **Shared Documents**. Use **My Private Documents** to store any personal files and use **Shared Documents** when uploading files that you want your Advisor to view and have access to.

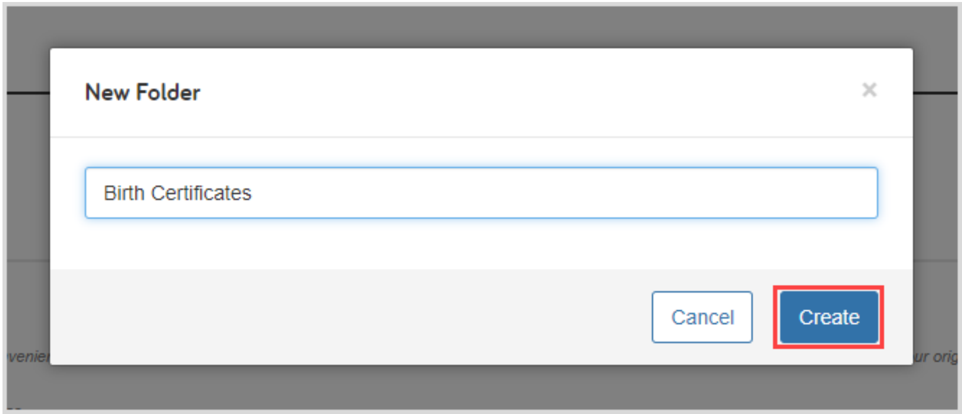


Note: The **New Folder** and **Upload Files** buttons in the top right will remain grayed out until you have clicked into either the **My Private Documents** or **Shared Documents** folders.

2. Once you click into either folder, you can now use the **New Folder** and the **Upload** button in the top right. Clicking the **New Folder** button allows you to create sub-folders for further organization of your files.

Desktop Vault Overview

3. After creating a new sub-folder, you will be prompted to enter the folder's name. Click **Create** when finished. Follow these steps to add as many sub-folders as needed.



Upload Files to the Vault

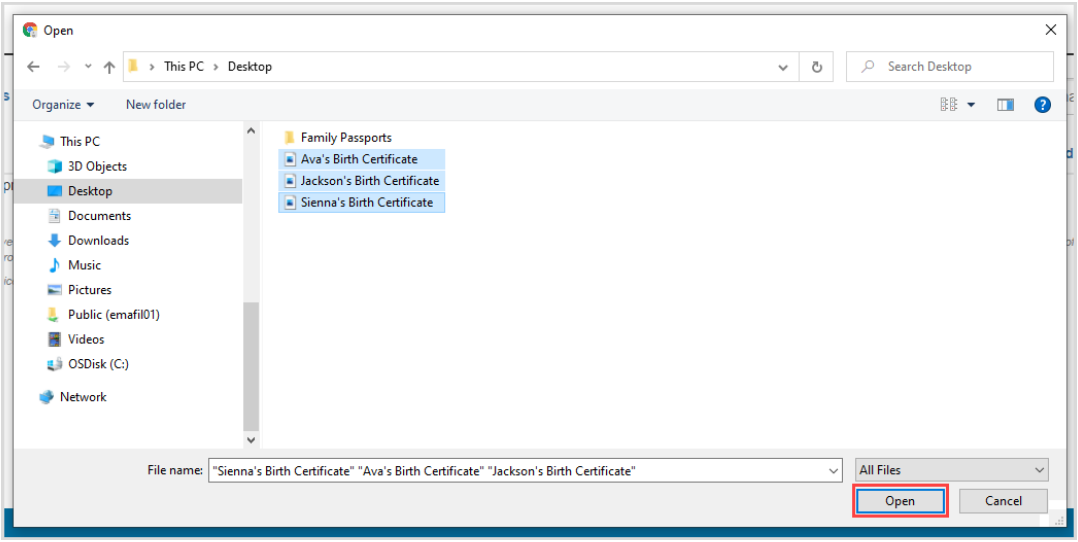
1. To upload files or an entire folder from your computer, first click either the **My Private Documents** or **Shared Documents** folder, then click **Upload** and select **Files** or **Folder**. If you want to upload to a sub-folder you have created, click the **sub-folder** first, then click the **Upload** button.

Note: Uploading a **folder** from your desktop will create a **sub-folder** in your Vault containing the files in that folder. Therefore, you may not need to manually create sub-folders in your Vault to upload to if your desktop files are organized in this way.

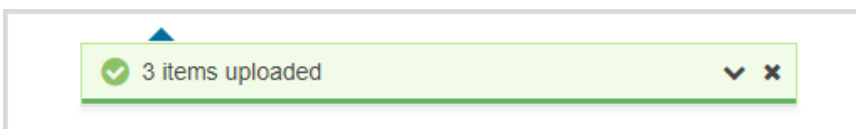
If you uploaded files to the wrong folder you can always use the **Move** option. This is explained on page 4.

Desktop Vault Overview

2. Your browser will open a new window that allows you to choose files or a folder to upload from your desktop. To select multiple files, hold down the **Shift** key while selecting the files individually. When ready, click **Open** or **Upload**. Depending on your browser, you may need to confirm the upload again.

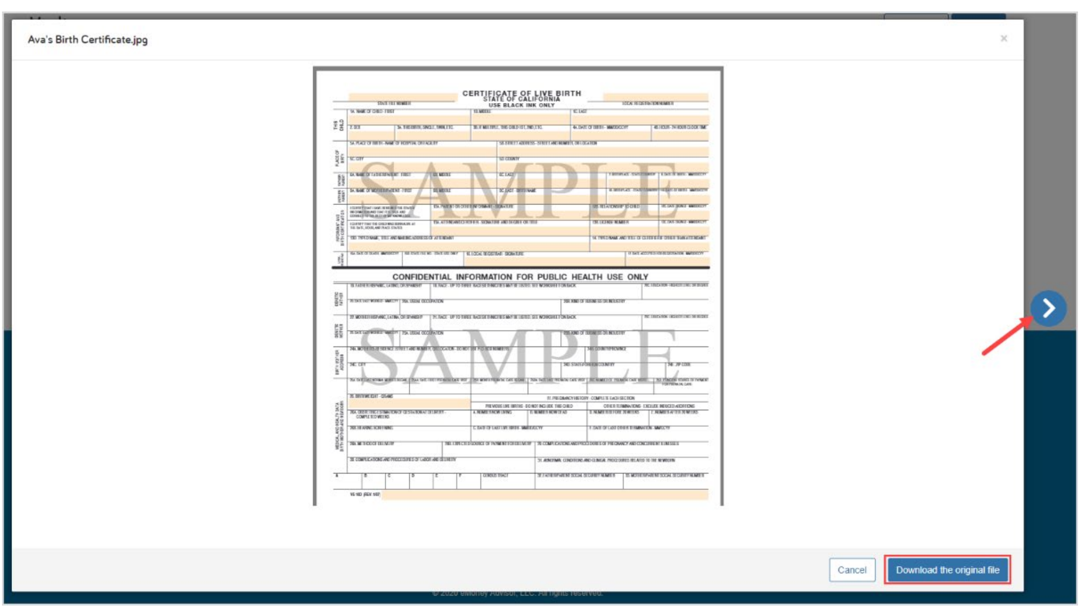


3. Once the files are successfully uploaded, you will see a green banner confirming the upload at the top of your Personal Financial Website.



Vault "Actions"

1. Clicking on a file in your Vault will bring you into preview mode where you have the options to **Download the original file** and easily preview other files within the folder.



Desktop Vault Overview

2. Each file has an **Actions** drop-down menu giving you the options to **Download**, **Copy**, **Move**, **Rename**, and **Delete** files.

Please Note:

- **Download:** This option will download the file to your desktop.
- **Copy:** This option allows you to copy the file and paste it into another folder, without removing it from the original folder.
- **Move:** This option allows you to move the file from this folder to another folder.
- **Rename:** This option allows you to rename the file name in your Vault.
- **Delete:** This option allows you to delete the file. Once deleted, the file cannot be recovered.

3. A final note, remember you can use the **Search** field to quickly filter through all of the files in your Vault.