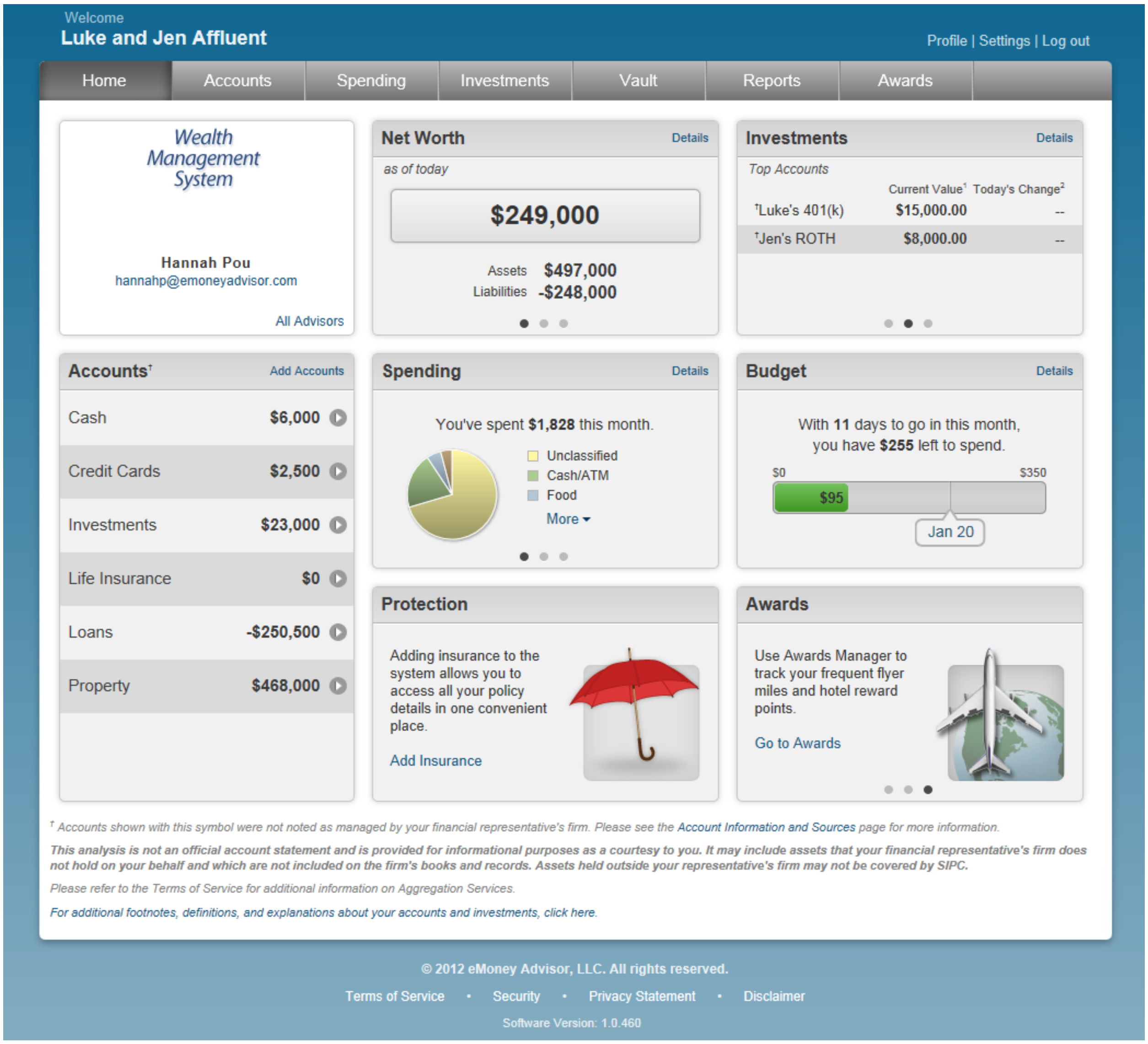
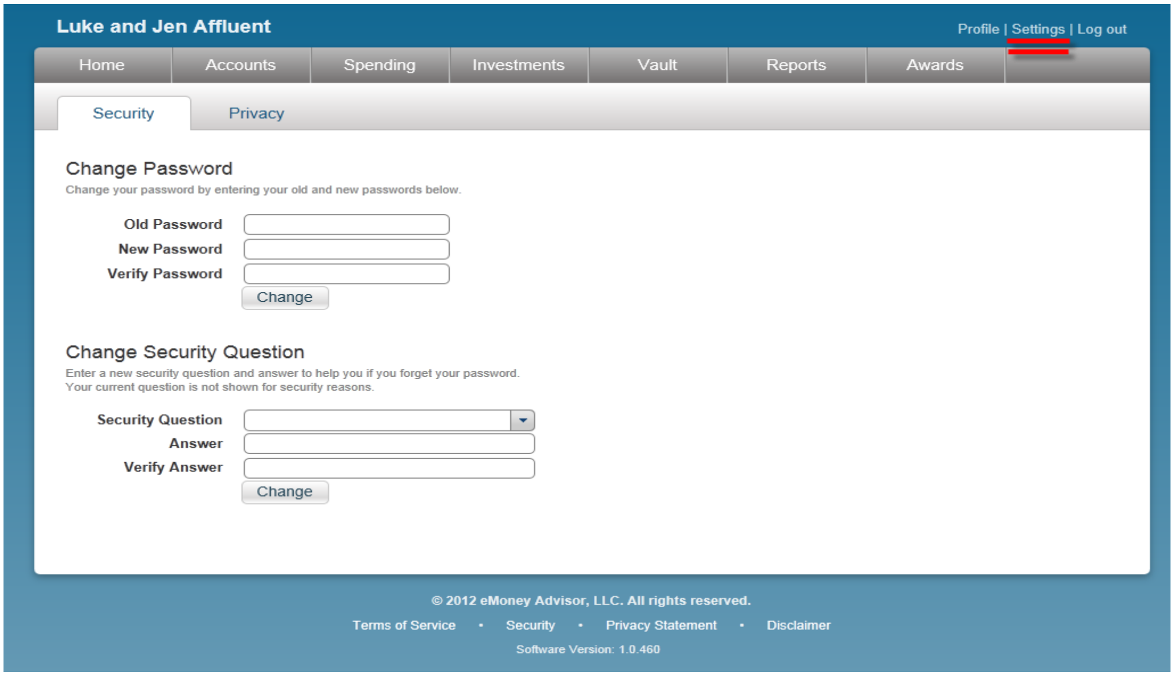
This training guide will demonstrate the **Client Website Overview**. Your Client Website is your own Personal Financial Website that will provide you with a consolidated view of your financial information.

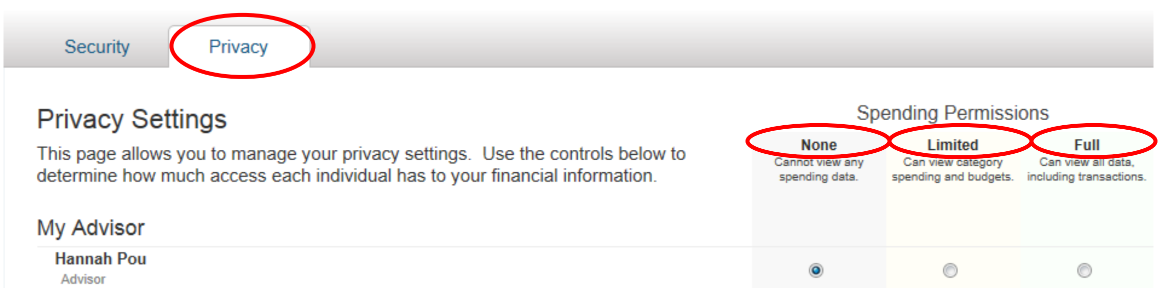
There are many features such as **Budgeting**, **Reports**, and the **Vault** (an online safe deposit box to store digital copies of valuable personal documents such as wills, trusts, passport information, photos, etc.).



1. You are able to set security & privacy **Settings**.



2. The **Privacy** tab allows you to control your Advisor's access.

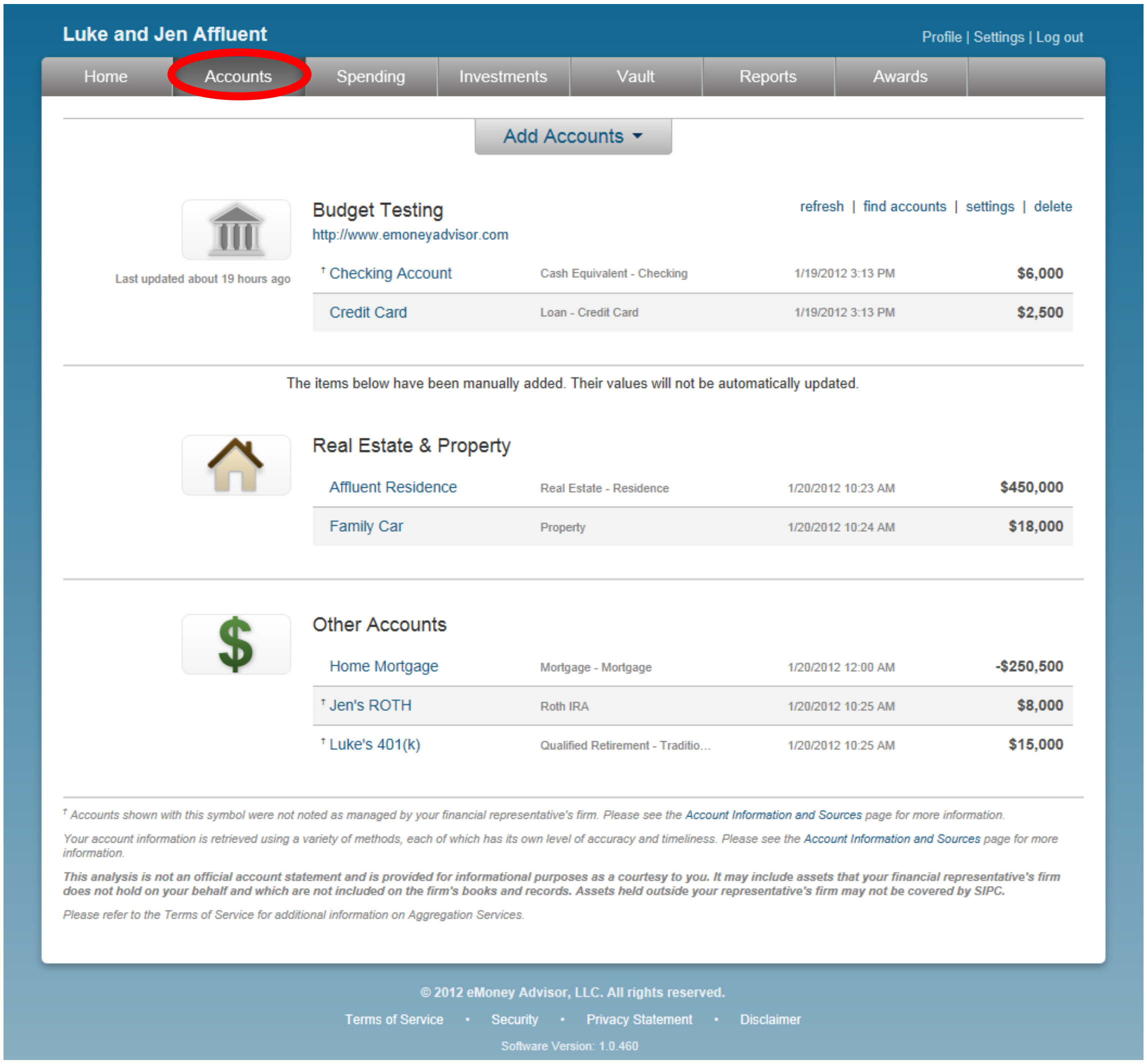


None – your Advisor will not have access to any of your spending data.

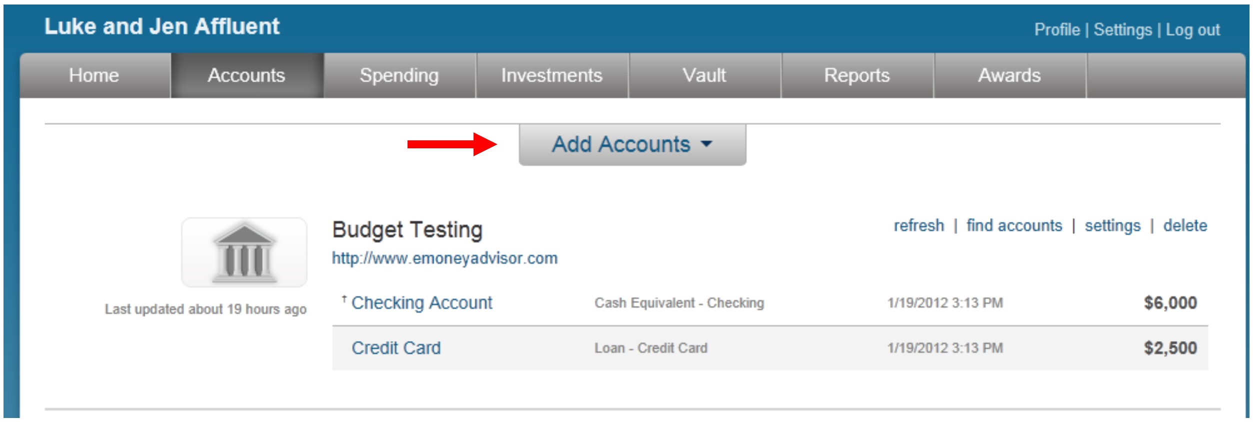
Limited- your Advisor has limited access to your spending details and can view only the categories regarding the spending and budget:

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

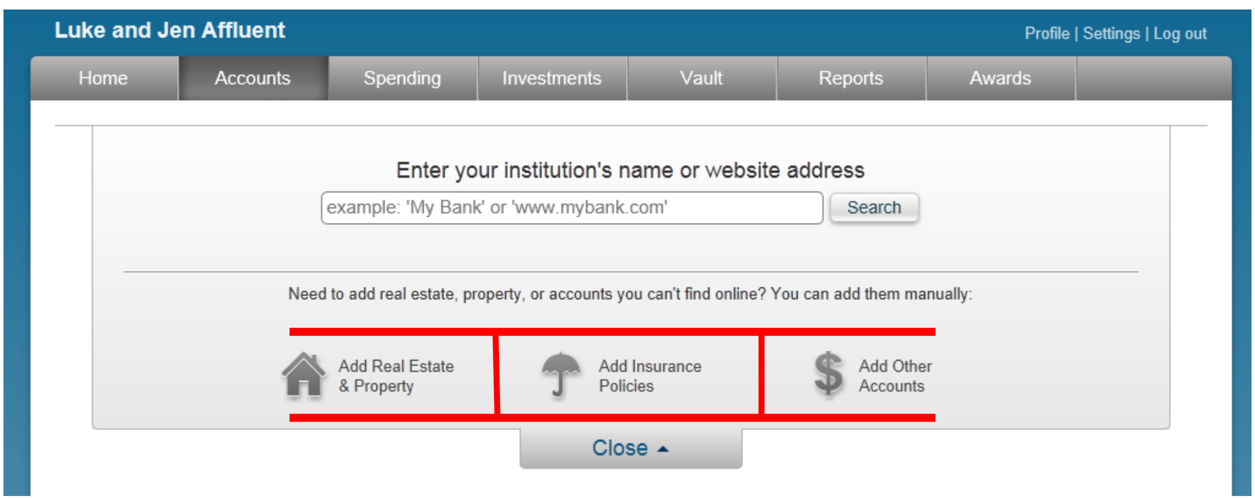
3. The **Accounts** tab provides you with a summary of aggregated & manually entered information.



4. From the **Add Accounts** drop down you can search for an institution by name or web address.

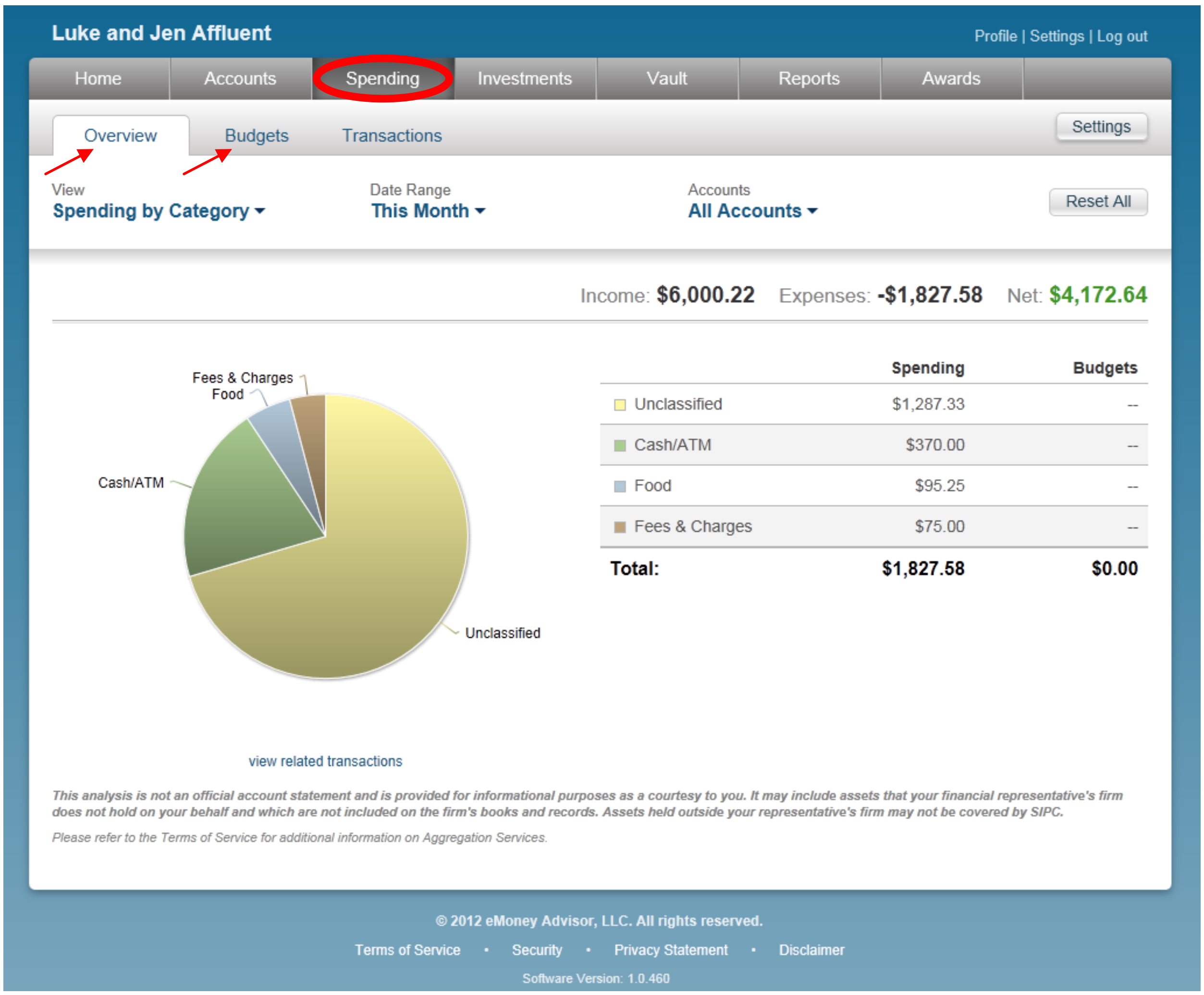


5. To **manually** enter data, select from the appropriate categories highlighted below.



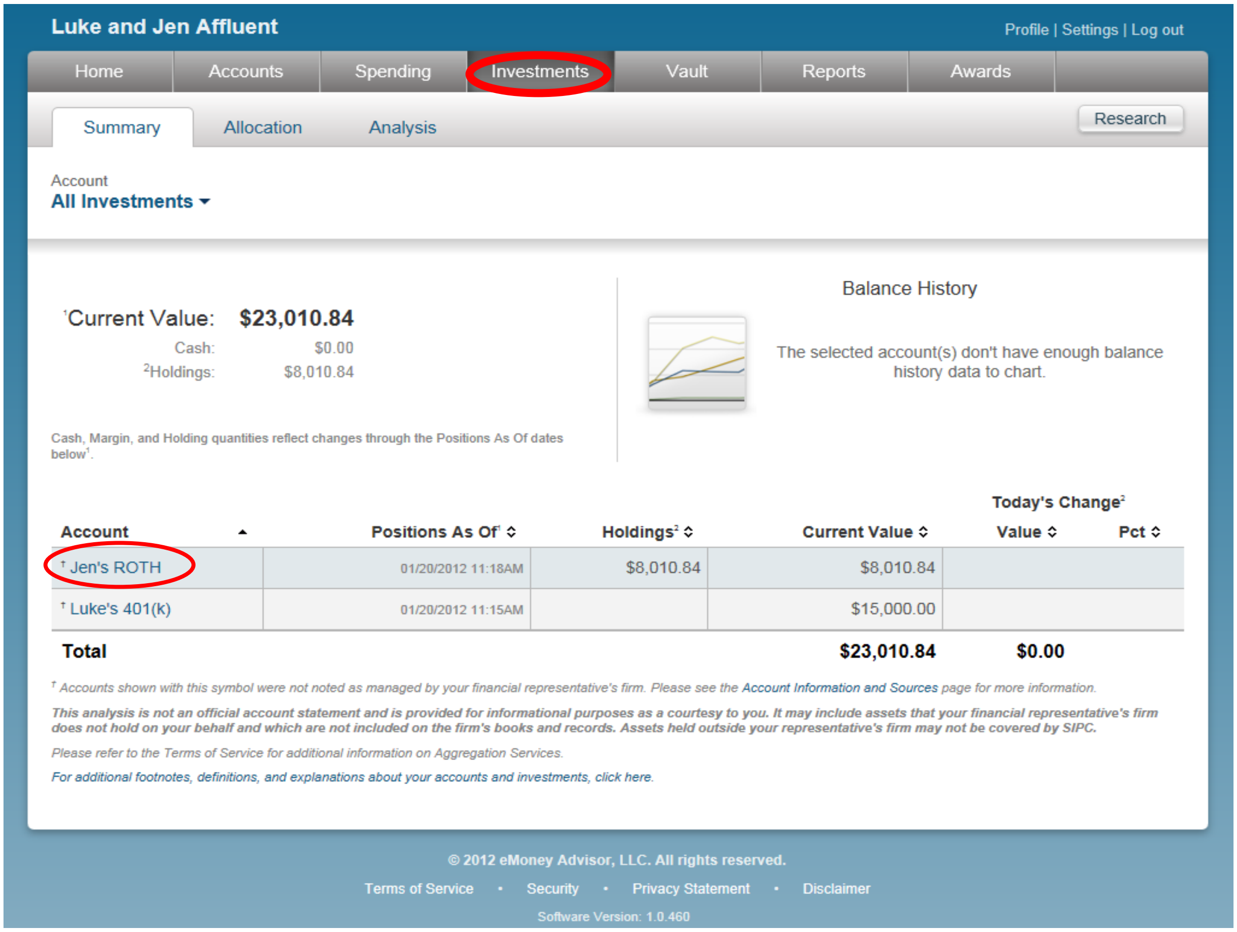
*Note: For more information on connecting accounts see the **Client Website Connection Guide.***

6. The **Spending** tab allows you to track your 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 you to monitor if you are on track with your monthly budget.

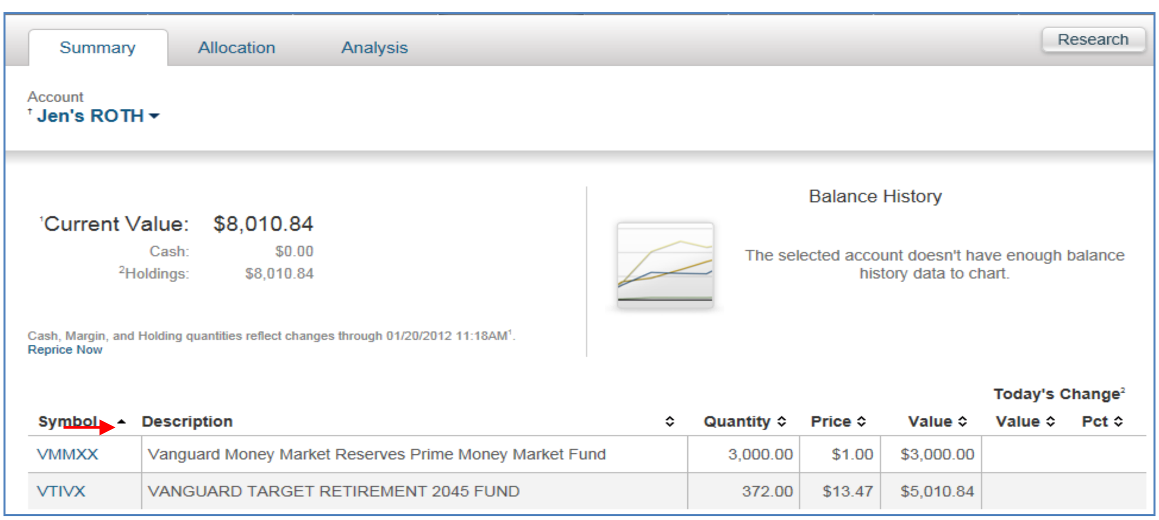


*Note: For detailed information on how the budgeting & transaction features work, please refer to the **Client Site Budgeting** user guide.*

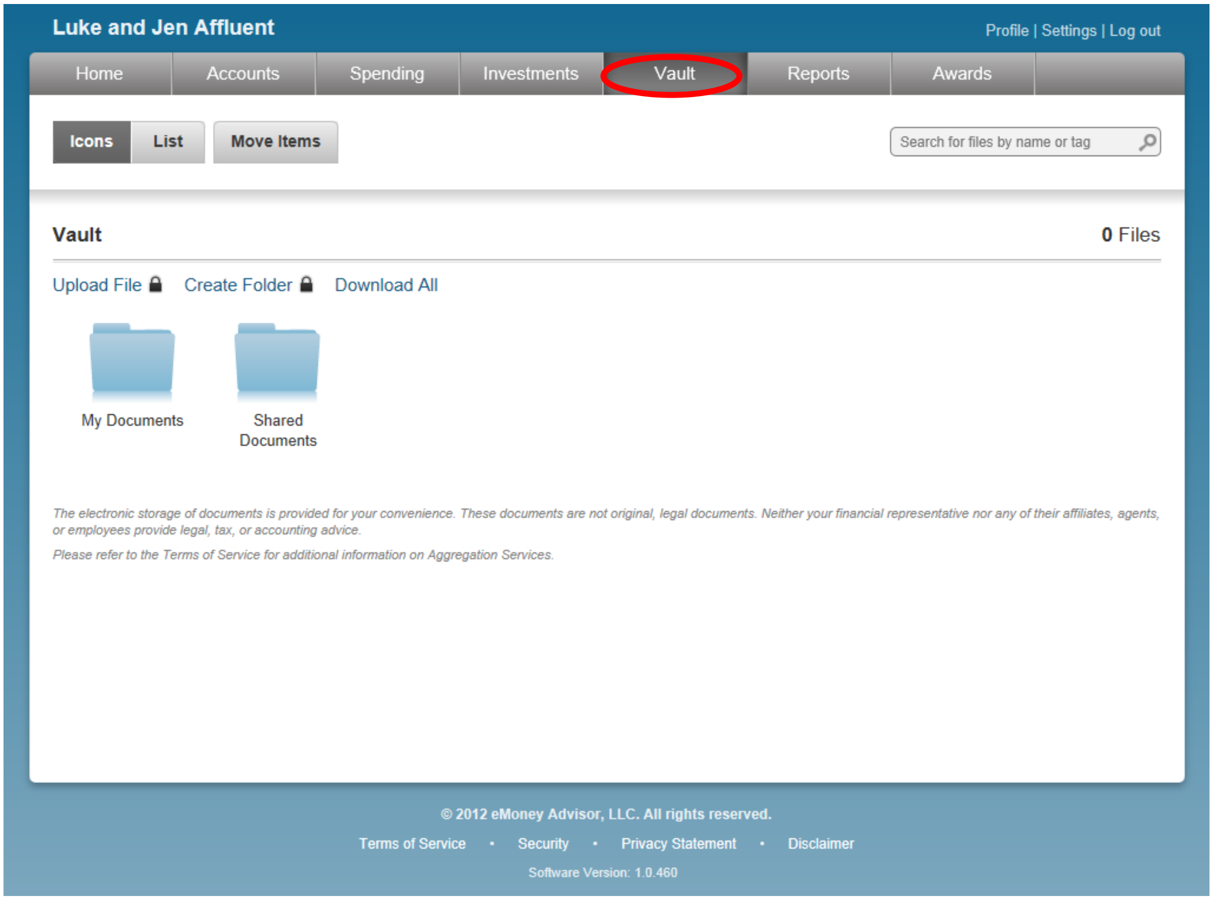
7. The **Investments** tab allows you to view up to date market information based off of any aggregated investments.



8. Click on the Account Name to see a holdings break down of a given account.

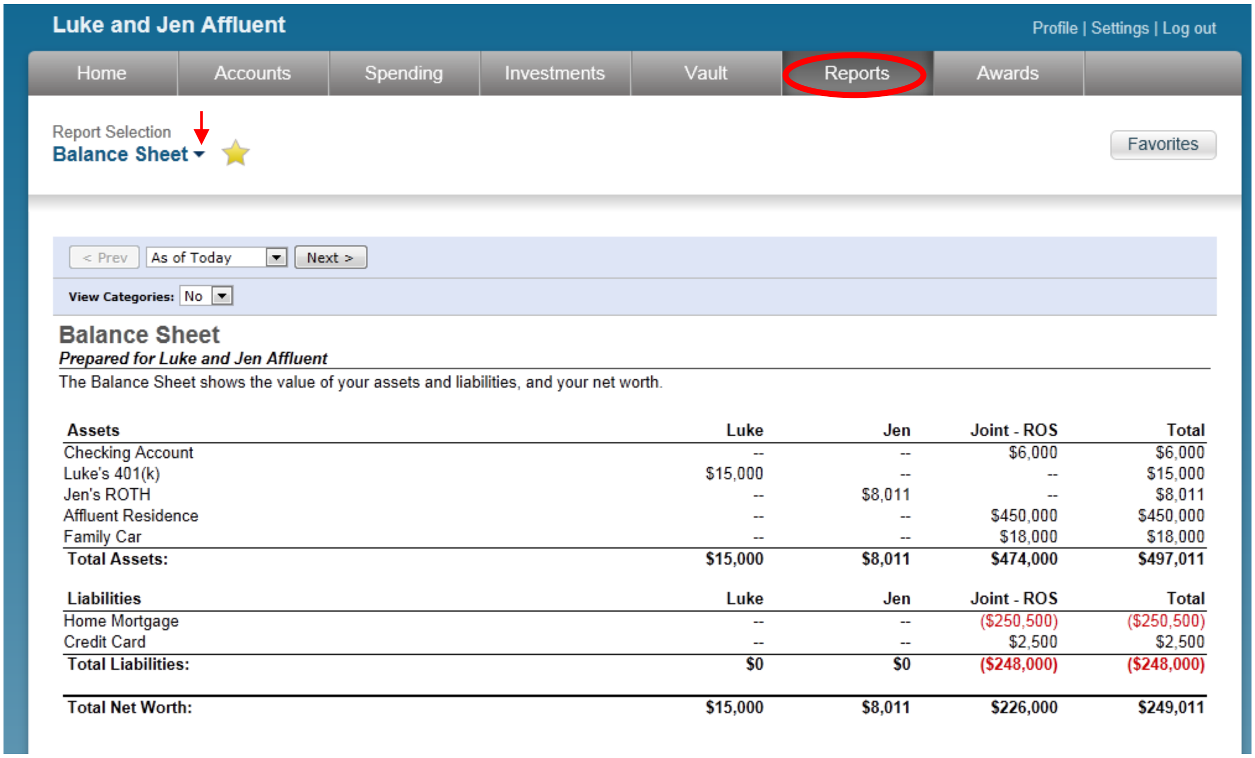


9. The **Vault** provides secure storage for valuable personal documents (**wills, trusts, insurance documents, passports, etc.**) in electronic format.
    a. You can upload documents into the **Shared Documents** folder allowing the advisor to also view the contents.
    b. You can upload documents into the **My Documents** folder which is a private folder where only *your access* can view the contents.

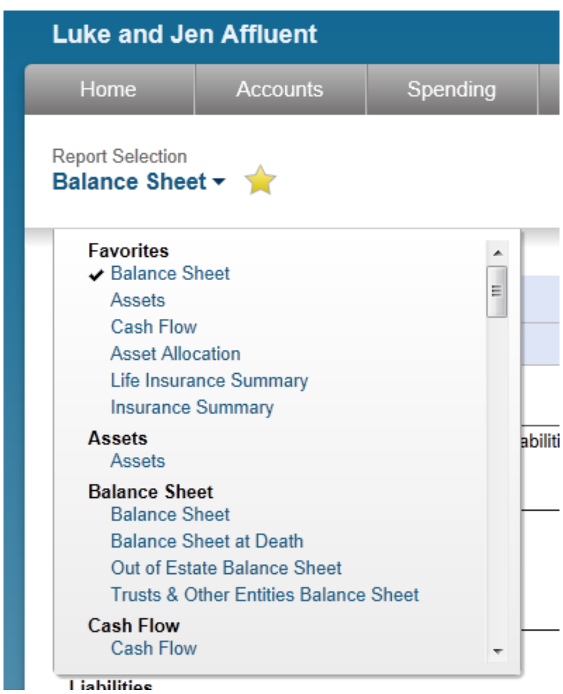


Note: *The Vault allows you to store files of the following types: aifc, aiff, aif, au, avi, bmp, doc, gif, jpg, jpeg, mov, mp3, mpeg, mpg, pdf, png, ppt, ps, rtf, snd, swf, tax, tif, tiff, txt, wav, wma, wmv, wps, xls, and xml.*

10. The **Reports** tab provides you with a series of statements about your financial situation. To view a report, simply choose from the drop down list located under Report Selection.



Assets	Luke	Jen	Joint - ROS	Total
Checking Account	--	--	$6,000	$6,000
Luke's 401(k)	$15,000	--	--	$15,000
Jen's ROTH	--	$8,011	--	$8,011
Affluent Residence	--	--	$450,000	$450,000
Family Car	--	--	$18,000	$18,000
Total Assets:	**$15,000**	**$8,011**	**$474,000**	**$497,011**
Liabilities	**Luke**	**Jen**	**Joint - ROS**	**Total**
Home Mortgage	--	--	($250,500)	($250,500)
Credit Card	--	--	$2,500	$2,500
Total Liabilities:	**$0**	**$0**	**($248,000)**	**($248,000)**
Total Net Worth:	**$15,000**	**$8,011**	**$226,000**	**$249,011**



11. The **Awards** tab is a free service that allows you to track Frequent Flyer miles, Hotel Award points, Credit Card Awards, and other points programs.
    a. By signing up for access you can track your awards on the web. You can also receive statements & alerts via-email.
    b. To enroll, click the **Enable Awards Manager** icon shown below.