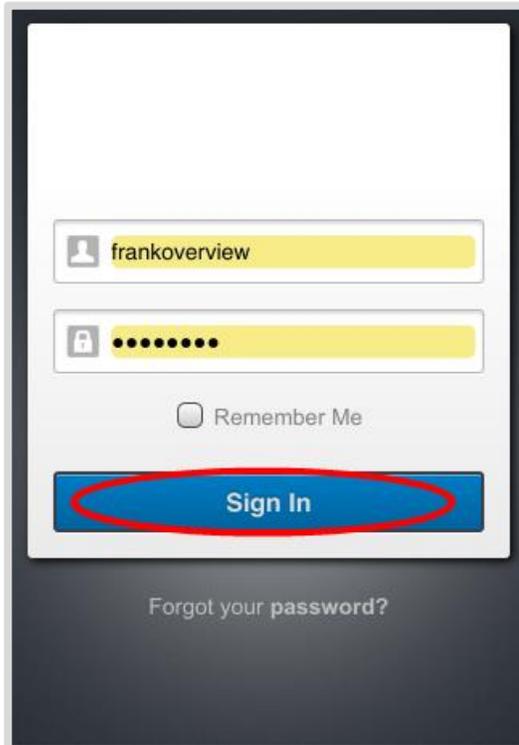


Mobile Site Overview

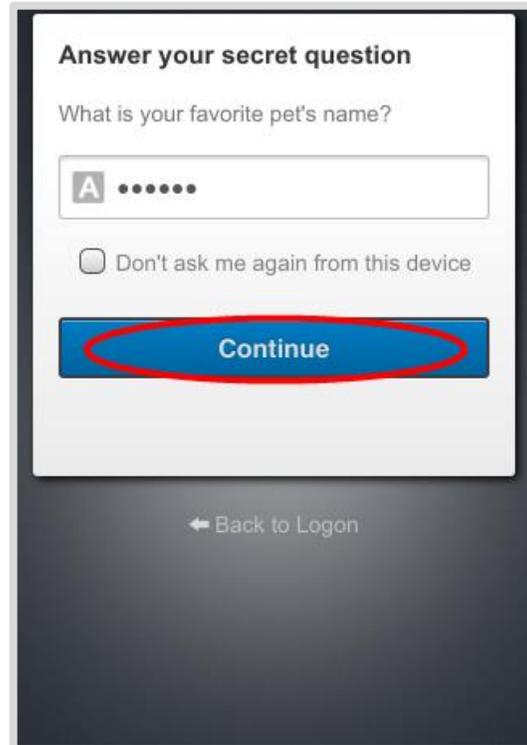
This training guide will demonstrate the functionality of the Mobile Client Site. The Mobile Client Site is a consolidated view of the financial information in your personal financial website.

This guide will give a brief overview the following features: Contacts, Accounts, Cash Flow, Budgeting, Transactions, Investments and the Vault.

1. From your smart phone, click the mobile app and log in.



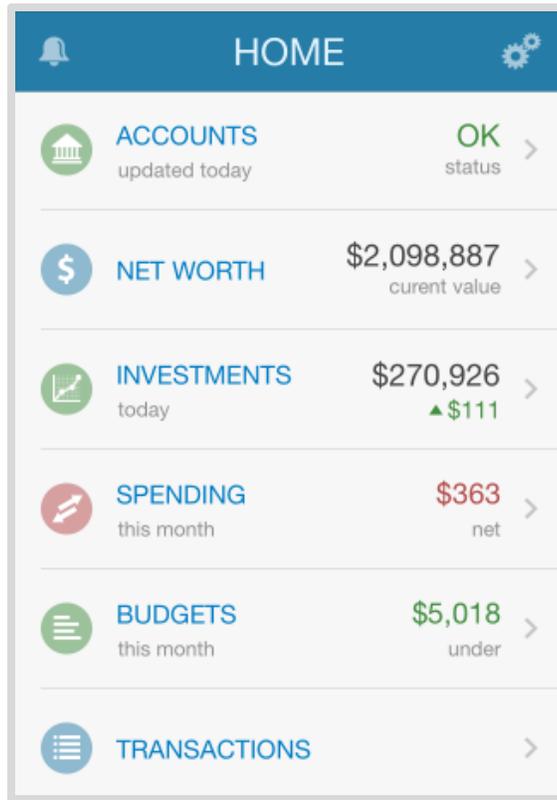
The image shows a mobile login screen. At the top, there is a text input field containing the username "frankoverview". Below it is a password input field with masked characters. A "Remember Me" checkbox is located below the password field. At the bottom of the form area is a blue button labeled "Sign In", which is circled in red. Below the form area, there is a link that says "Forgot your password?".



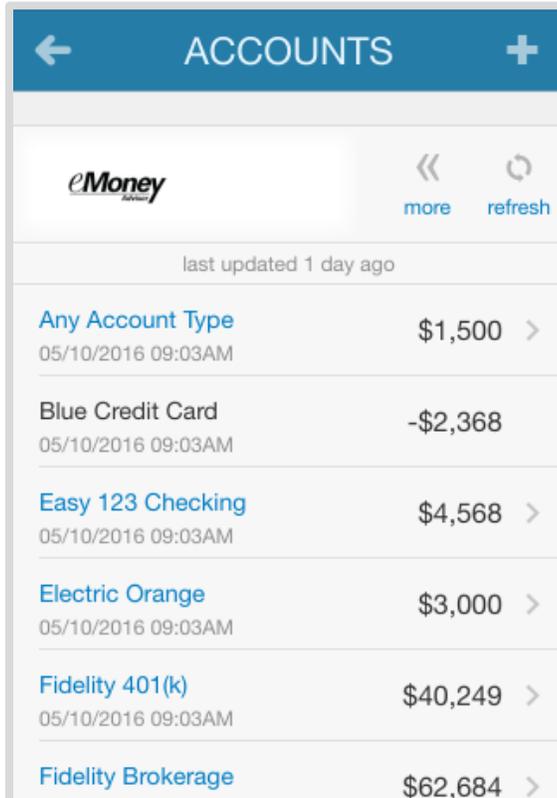
The image shows a mobile security question screen. The title is "Answer your secret question". Below the title is the question "What is your favorite pet's name?". There is a text input field with a small "A" icon and masked characters. Below the input field is a checkbox labeled "Don't ask me again from this device". At the bottom of the form area is a blue button labeled "Continue", which is circled in red. Below the form area, there is a link with a left arrow that says "Back to Logon".

Mobile Site Overview

2. Once authenticated, you will see a summary of your financial profile.

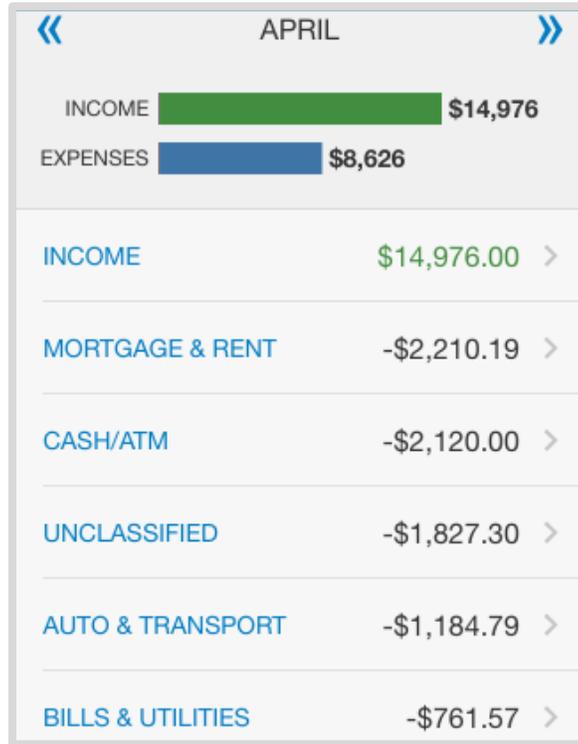


3. **Accounts** will allow you to view your latest account data, while also informing you of any maintenance required when necessary.

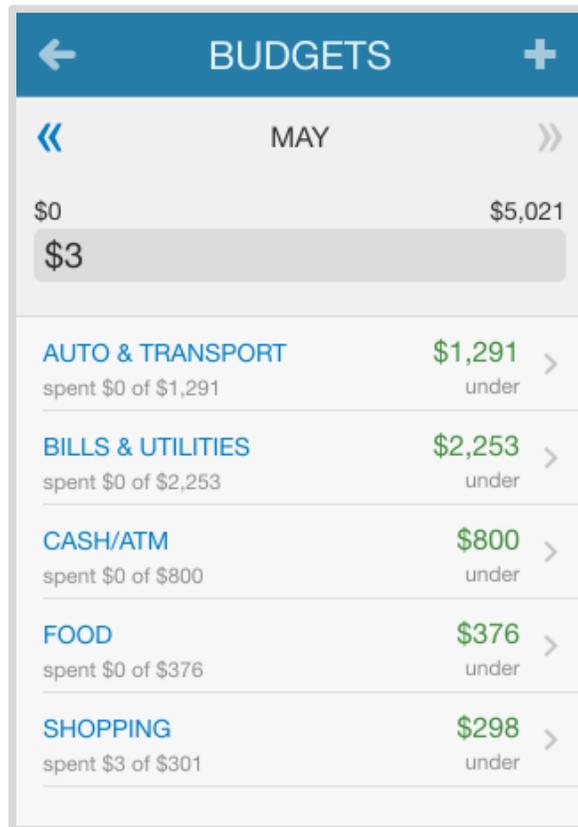


Mobile Site Overview

4. Spending shows you this month's spending data by category. This data is imported directly from connected accounts. You can scroll through previous months by using the << >> arrows.

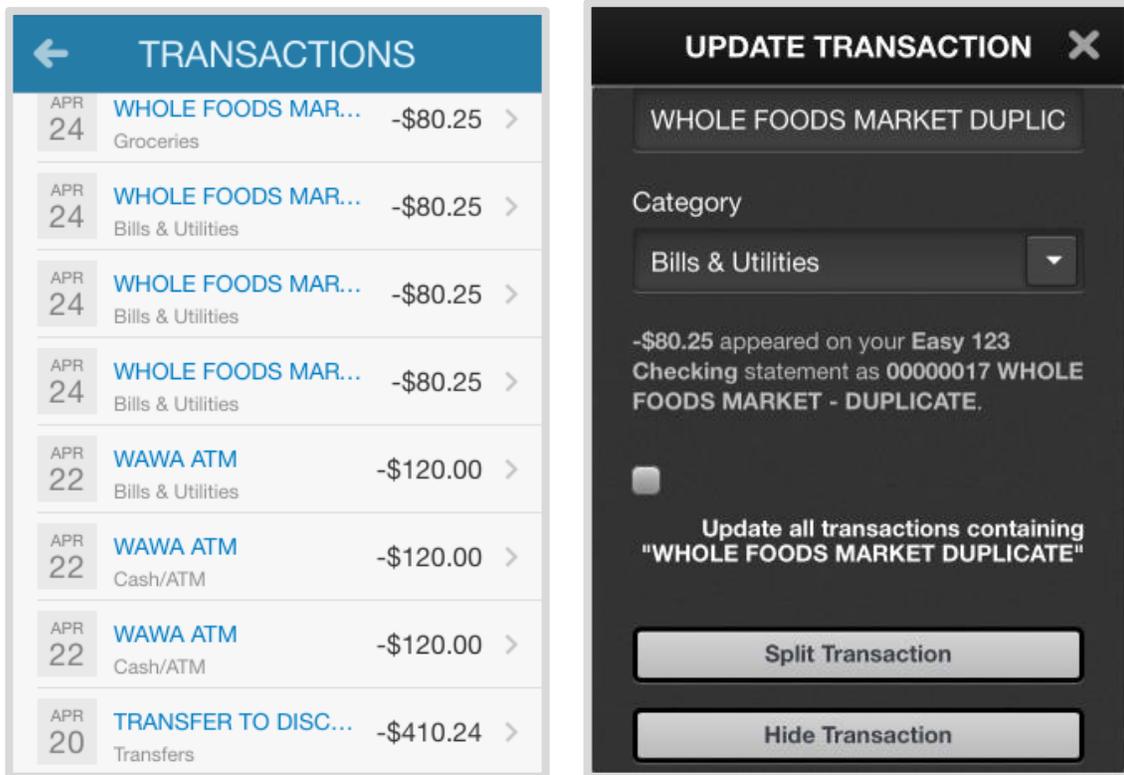


5. Tap the Budgets tab to see a snapshot of your budget.



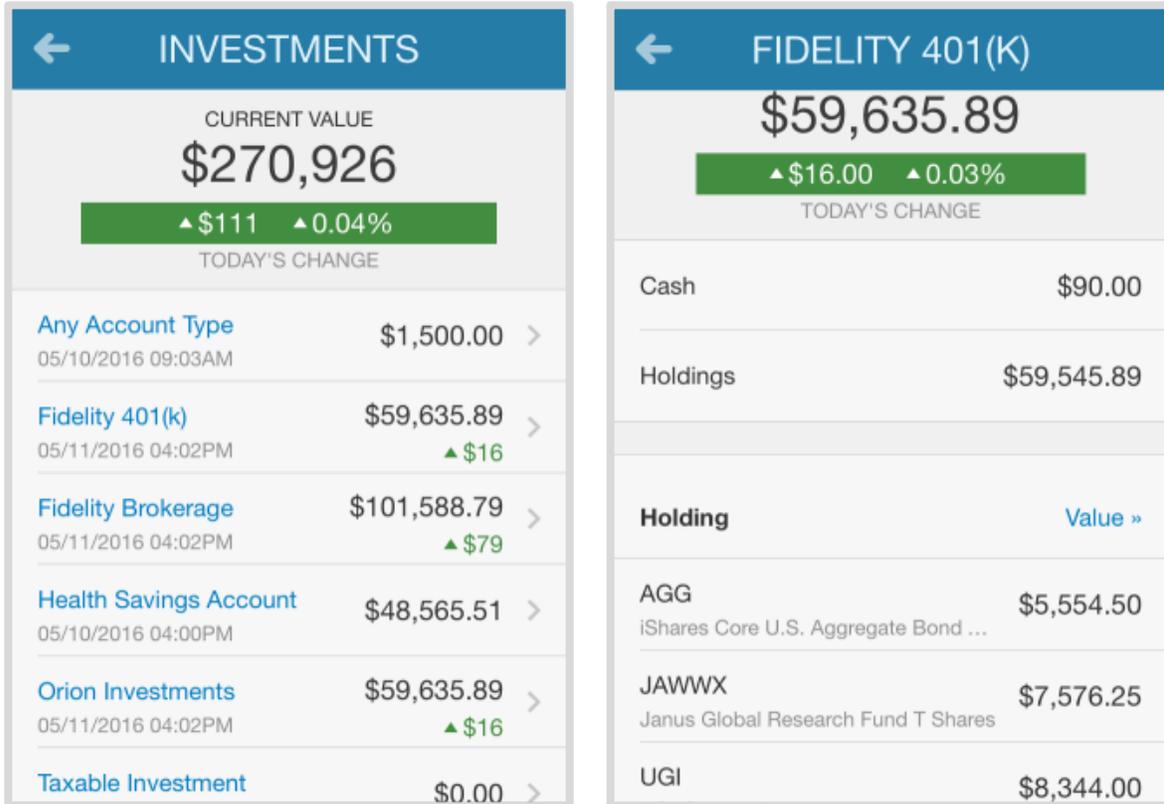
Mobile Site Overview

6. Tap Transactions to view your recent transaction details from your connected accounts. You can tap into any transaction to see further details or to re-categorize.

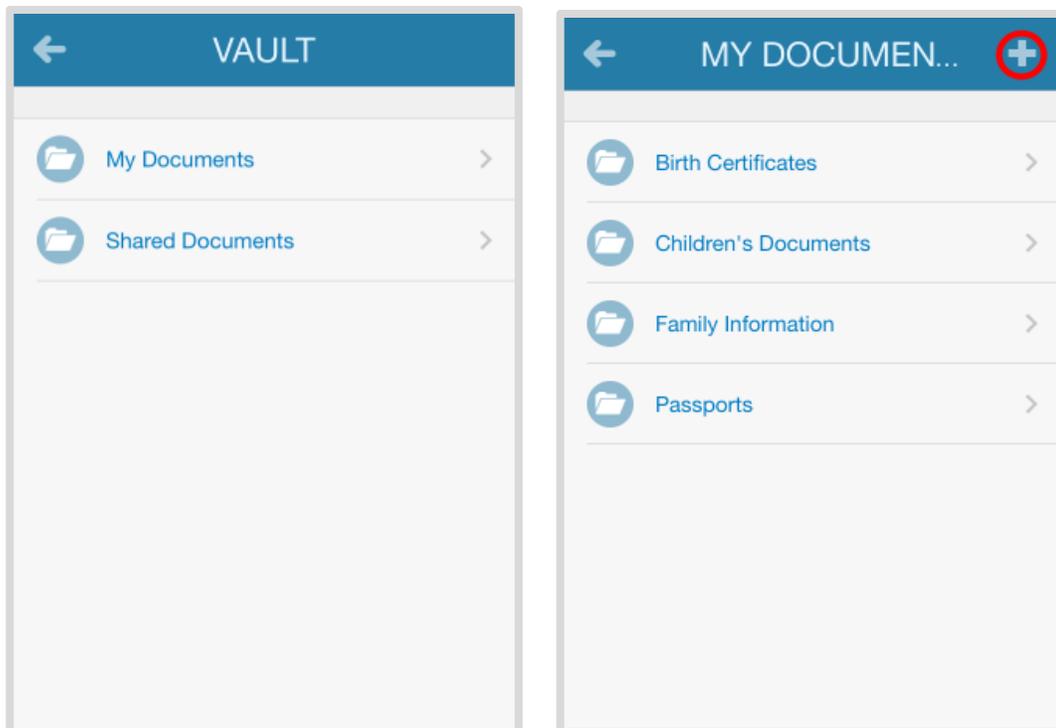


7. Tap Investments to view up-to-date market information for any connected investment. Here you can tap into any account and view a holdings breakdown of that account

Mobile Site Overview



8. Tap Vault to view personal documents in electronic format.



The **My Documents** folder is hidden from your advisor. The **Shared Documents** folder can be viewed by your advisor. To upload into either folder, tap that folder and tap the subfolder you want to upload into. Then click the + symbol in the top right.

