

Client Site Overview

Take Control of Your Financial World

Financial Workshops

See if you're on target to reach your most important financial goals.

Organizer

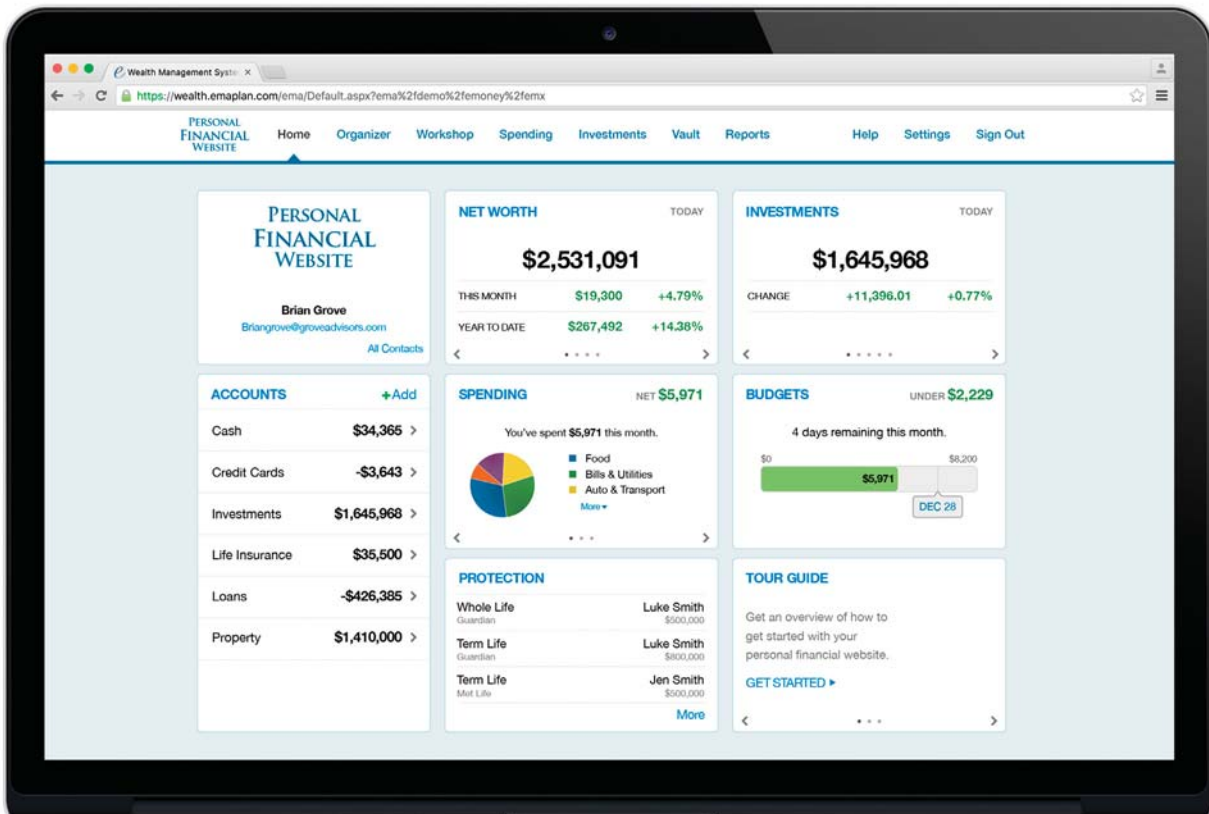
View the information you need most – like Account list, Net Worth, and Investments – front and center.

Mobile

See your complete financial picture from your smart phone or tablet.

Investments

Easily monitor all your important investments around the clock.



Vault

Safely store your most important financial documents, accessible 24/7.

Budgeting Tools

Set budgets and track spending to help you reach your savings goals.

Security

Benefit from the industry's highest level of encryption guarding all your data.

Screen Sharing

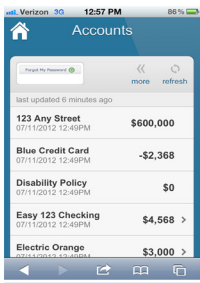
Join a screen sharing session quickly and easily for interactive planning anytime, anywhere.

YOUR NEW

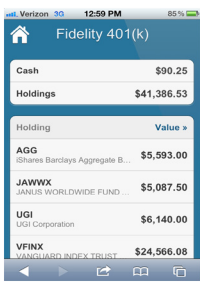
Personal Financial Website

Mobile

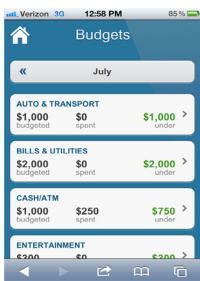
The Answers You Need, **Wherever You Are.**



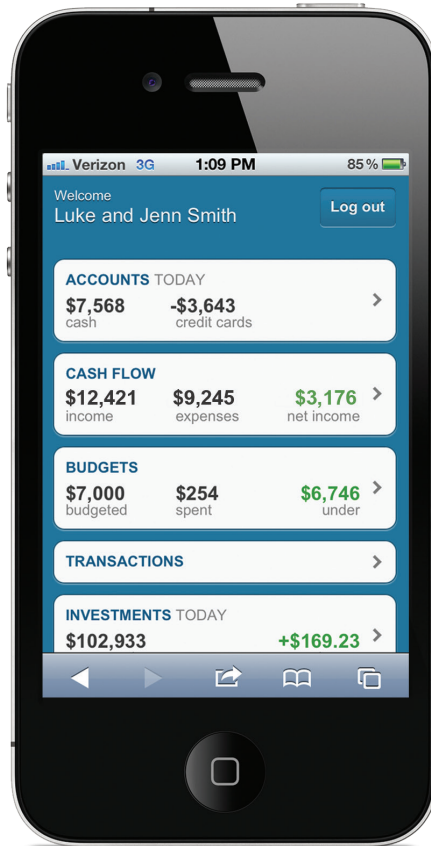
All Your **Accounts** on One Page.



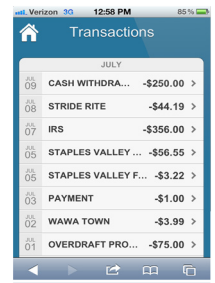
Get Updated on Your **Investments.**



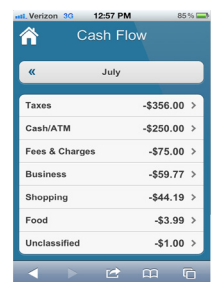
Track Your Progress Towards Your **Goals.**



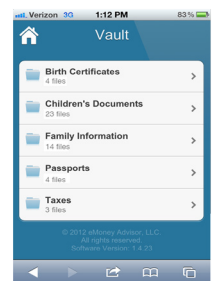
See What You're **Spending.**



Monitor Your **Cash Flow.**



Access **Important Documents.**



Your Personal Financial Mobile Website can be accessed on the iPhone, Android, the newest Blackberry and most other popular smart phones. Here's how to get started:

- Access the browser on your mobile device and visit the same logon page as your Personal Financial Website.
- Before you log on, add or save the link to your Home Screen. You will want to do this first or the icon will not appear.
- Enter the same User Name and Password that you use to access your Personal Financial Website.

Have questions? Give us a call or send us an email, we are here to help.