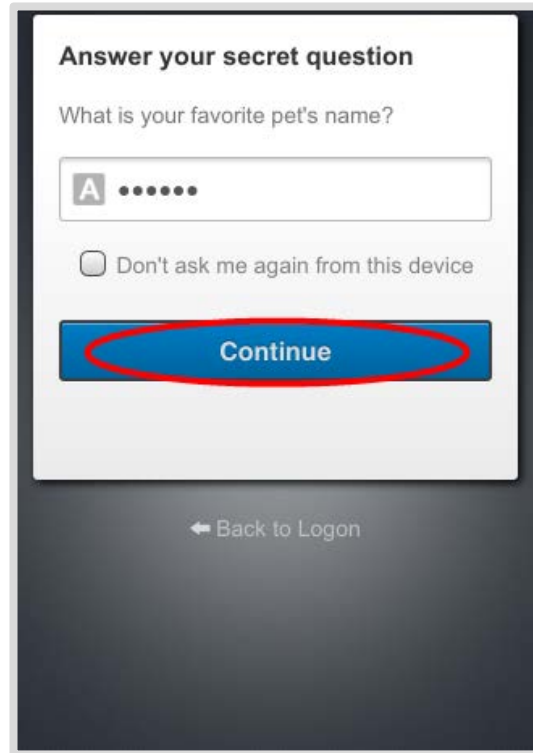
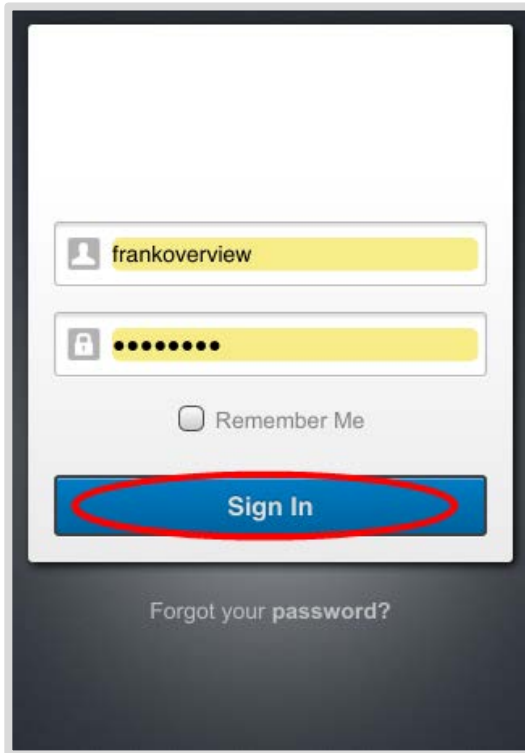


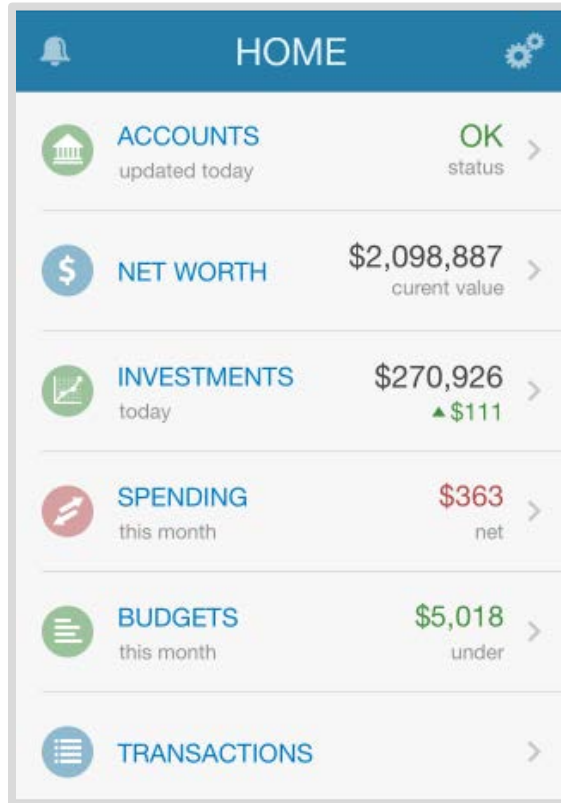
This training guide will demonstrate the functionality of the Mobile Client Site. The Mobile Client Site is a consolidated view of the financial information in your personal financial website.

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

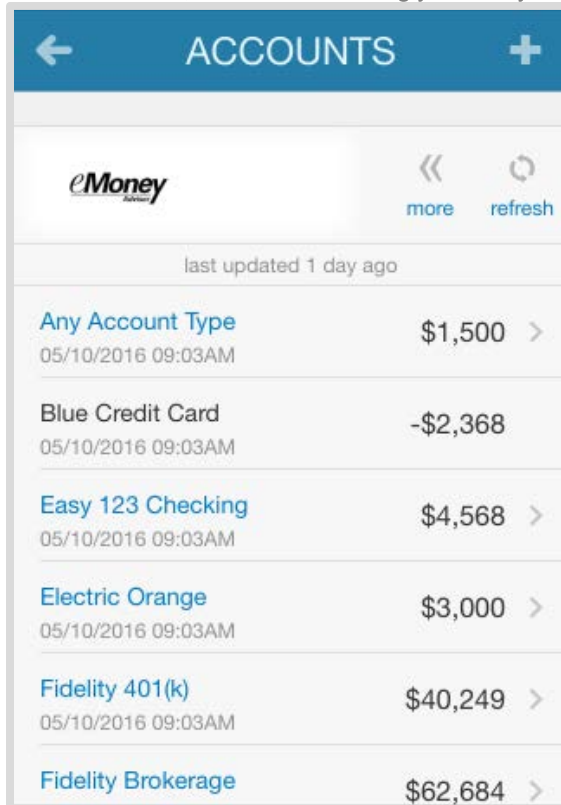
1. From your smart phone, click the mobile app and log in.



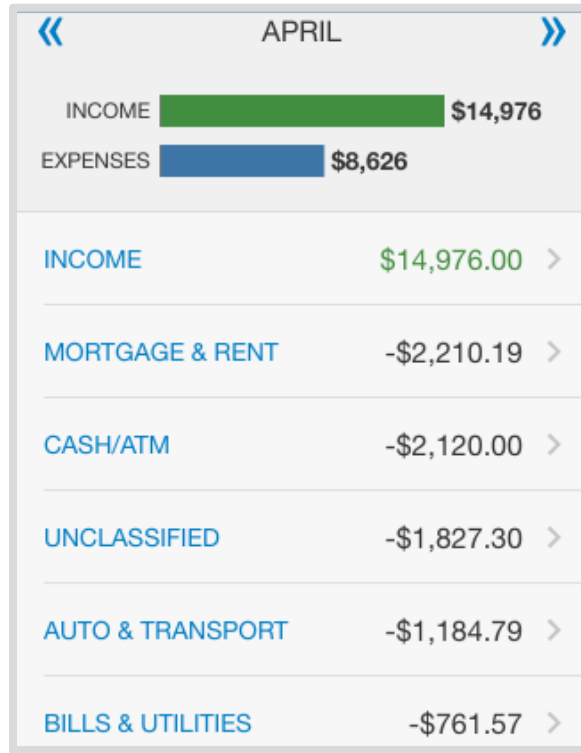
2. Once authenticated, you will see a summary of your financial profile.



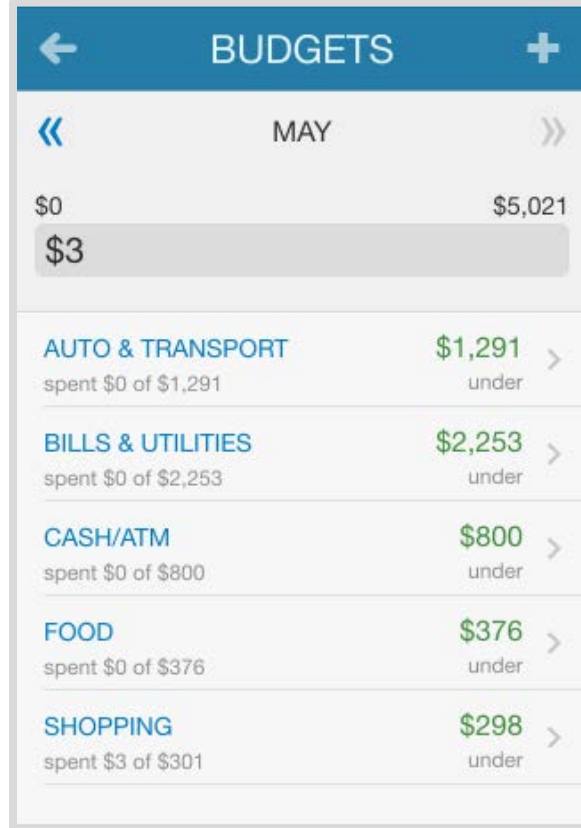
3. **Accounts** will allow you to view your latest account data, while also informing you of any maintenance required when necessary.



- 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.



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



- 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.

The first screenshot shows the 'TRANSACTIONS' screen with a list of recent transactions. The second screenshot shows the 'UPDATE TRANSACTION' screen for a duplicate Whole Foods Market transaction.

Date	Description	Amount
APR 24	WHOLE FOODS MAR... Groceries	-\$80.25
APR 24	WHOLE FOODS MAR... Bills & Utilities	-\$80.25
APR 24	WHOLE FOODS MAR... Bills & Utilities	-\$80.25
APR 24	WHOLE FOODS MAR... Bills & Utilities	-\$80.25
APR 22	WAWA ATM Bills & Utilities	-\$120.00
APR 22	WAWA ATM Cash/ATM	-\$120.00
APR 22	WAWA ATM Cash/ATM	-\$120.00
APR 20	TRANSFER TO DISC... Transfers	-\$410.24

UPDATE TRANSACTION

WHOLE FOODS MARKET DUPLIC

Category: Bills & Utilities

-\$80.25 appeared on your Easy 123 Checking statement as 00000017 WHOLE FOODS MARKET - DUPLICATE.

Update all transactions containing "WHOLE FOODS MARKET DUPLICATE"

Buttons: Split Transaction, Hide Transaction

- 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

The first screenshot shows the 'INVESTMENTS' screen with a list of investment accounts. The second screenshot shows the 'FIDELITY 401(K)' screen with the current value and a breakdown of holdings.

Account Name	Current Value	Today's Change
Any Account Type	\$1,500.00	▲\$111 ▲0.04%
Fidelity 401(k)	\$59,635.89	▲\$16
Fidelity Brokerage	\$101,588.79	▲\$79
Health Savings Account	\$48,565.51	
Orion Investments	\$59,635.89	▲\$16
Taxable Investment	\$0.00	

FIDELITY 401(K)

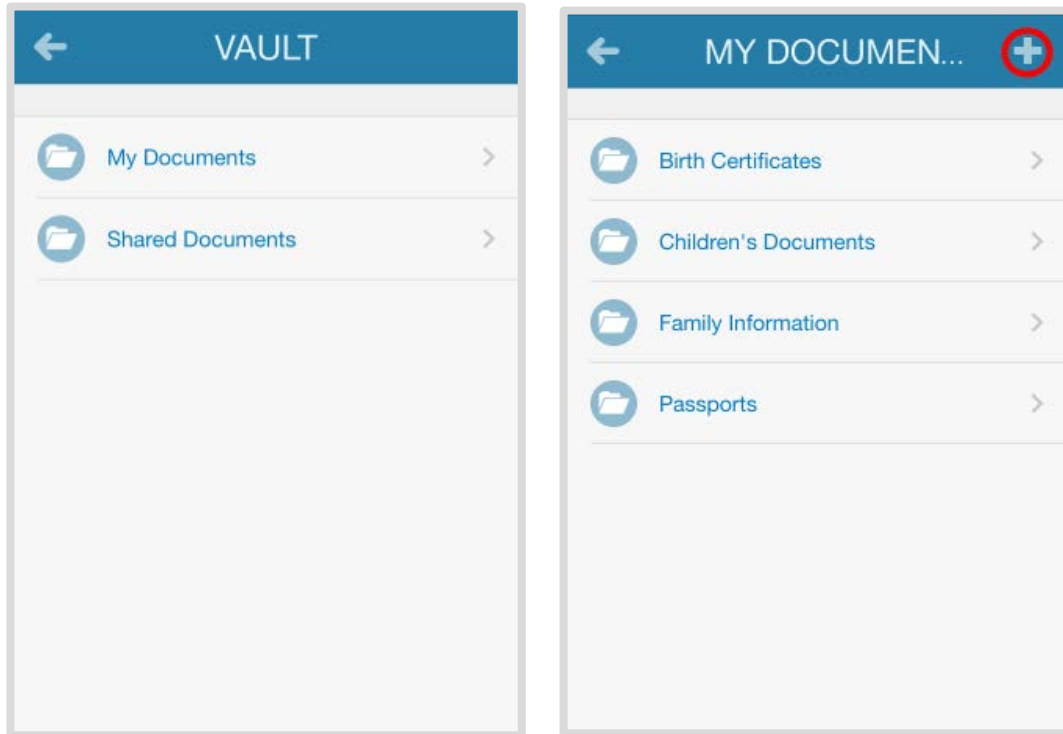
CURRENT VALUE: \$59,635.89

TODAY'S CHANGE: ▲\$16.00 ▲0.03%

Category	Value
Cash	\$90.00
Holdings	\$59,545.89

Holding	Value
AGG (iShares Core U.S. Aggregate Bond ...)	\$5,554.50
JAWWX (Janus Global Research Fund T Shares)	\$7,576.25
UGI	\$8,344.00

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.

