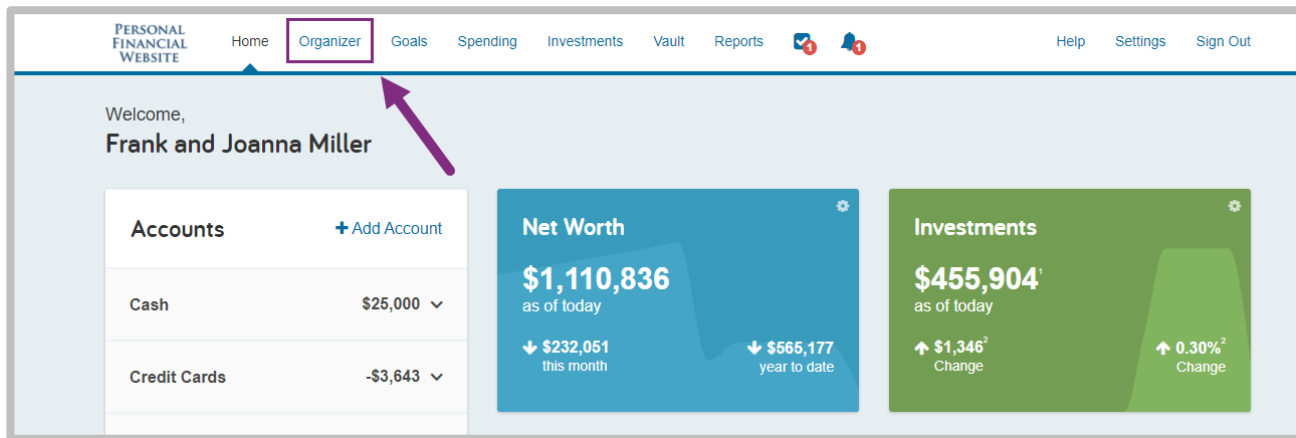


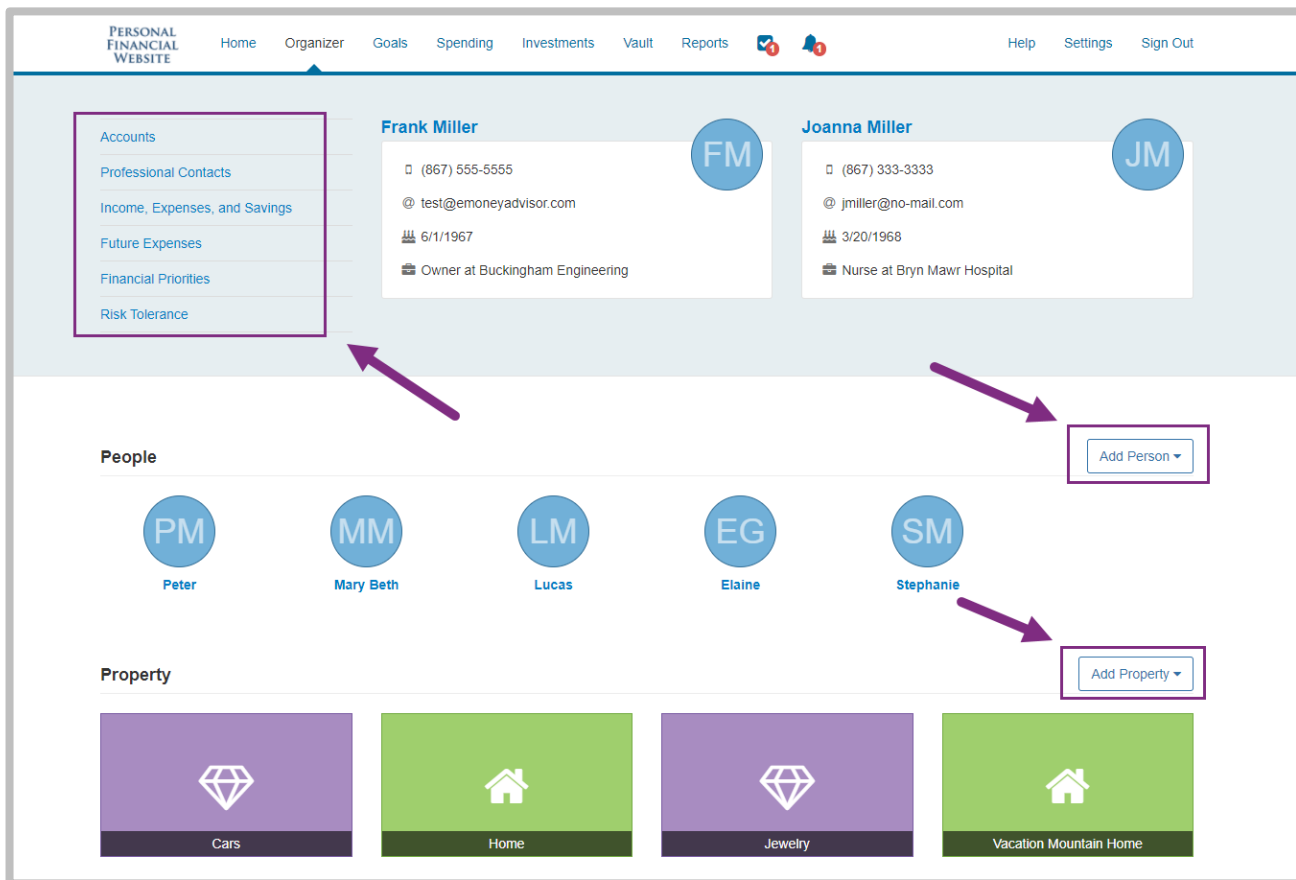
Organizer Overview

In this guide we will walk you through the features of your Client Site **Organizer**. Use the Organizer to group all your financial information in one place. Click the different sections to add and edit the related information. The information included here will be used to populate other areas of the application, including the Home page.

1. To access, click the **Organizer** tab from the toolbar.

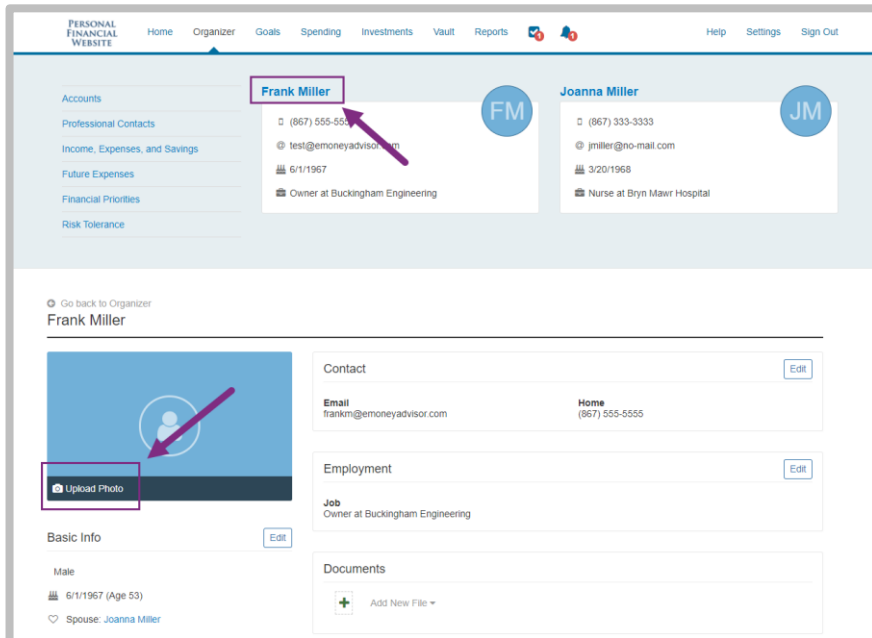


2. The Organizer allows you to group all of your financial information in one place as seen below.

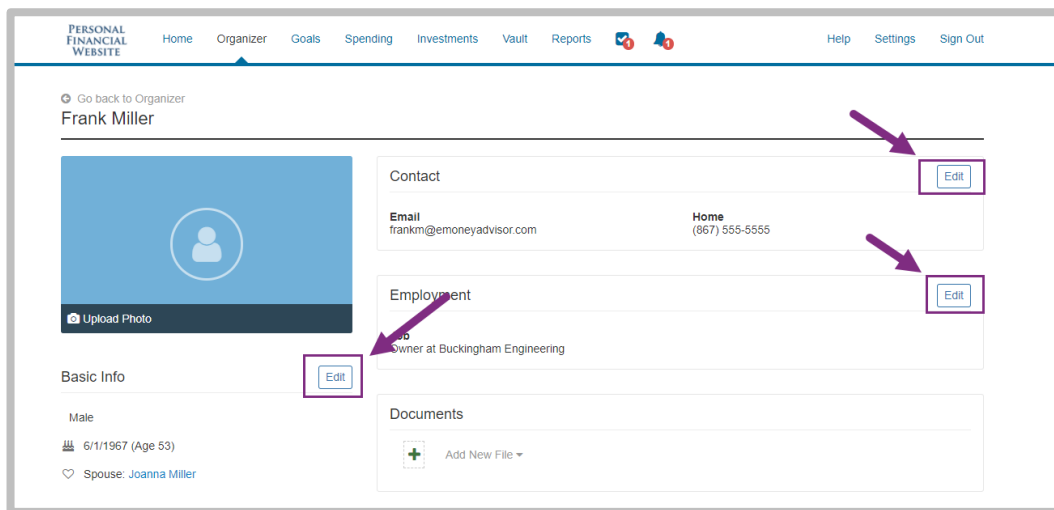


Organizer Overview

- To modify any of your personal information or upload a profile picture to the site, click your name. To upload a picture, click **Upload a Photo** and search directly from the computer's hard drive.



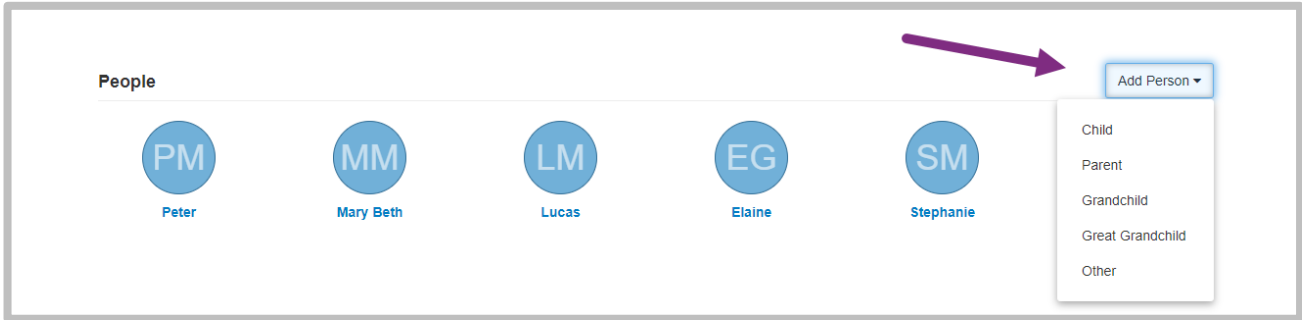
- After clicking into your profile, you and your spouse can edit Basic Info, Contact and Employment Info and also upload relevant documents to your online vault.



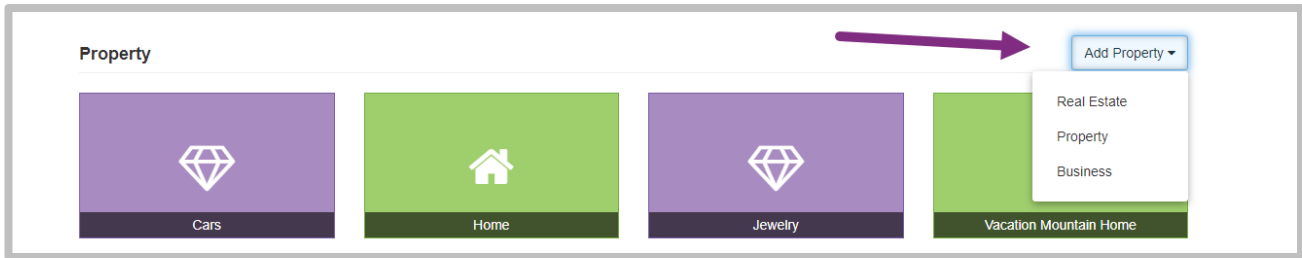
Basic Info: First & Last name, DOB, Gender, Special Needs, In Good Health, and Marital Status
Contact Info: Email, Phone, Mobile Phone, Fax, and Full Address. Note that only the Mobile Phone number is what will display on the organizer overview.
Employment Info: Employer Name, Job Title, Email

Organizer Overview

- 5. On the organizer main tab, you will also be able to add relevant **People** and **Property**.
- 6. To add a person, click **Add Person** and choose what to add & enter details. You can upload a picture of each person on their individual page.

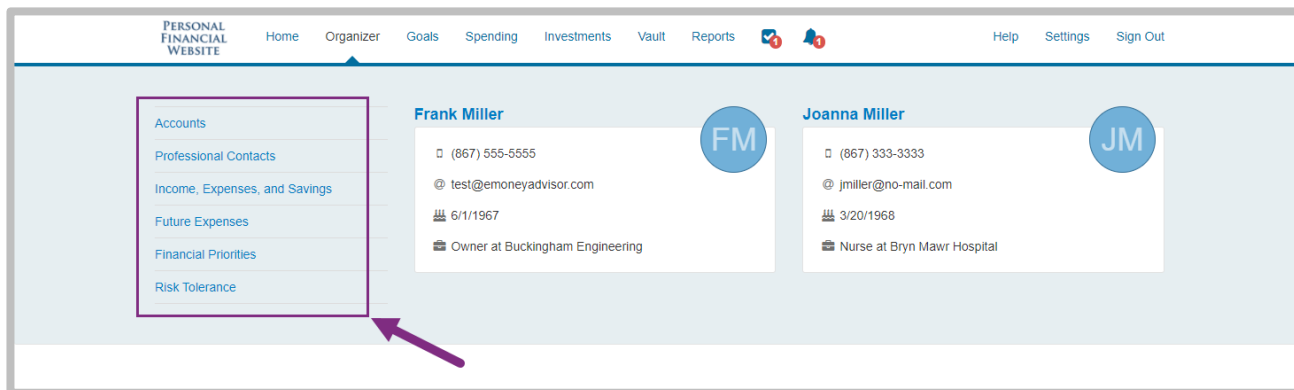


- 7. To add property, click **Add Property** and select Real Estate, Property, or Business.



Organizer Overview

8. The menu options on the upper left side of the organizer tab lists out the available sections the client can view and/or modify. Click an item to view its details. Click **Add** to add information within a section, and click **Save** to save the changes.



Accounts: allows you to add your online accounts directly from an institution or to add them manually. Click the Add button at the top of the page to enter your institution's name or to select the icons to add insurance policies and other accounts that are not connected to your institutions.

Professional Contacts: allows you to add information about any relevant contacts. Your Advisor will always be listed first in this section. Click Add, and then add contact information.

Income, Expenses, and Savings: contains your annual income, living expenses, and savings and contributions.

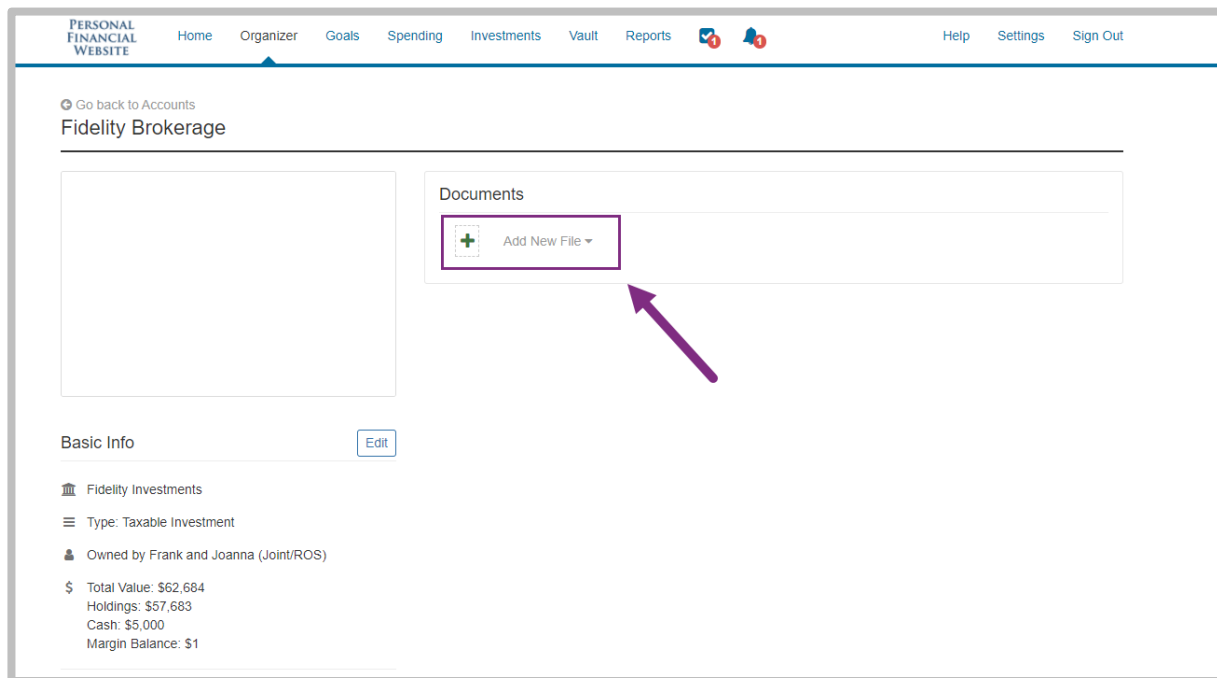
Future Goals: allows you to enter in an assumed age of retirement, view existing or add education goals, and any existing or new major expenses.

Financial Priorities: used to assign an order to your financial goals. Client and Spouse can prioritize their goals.

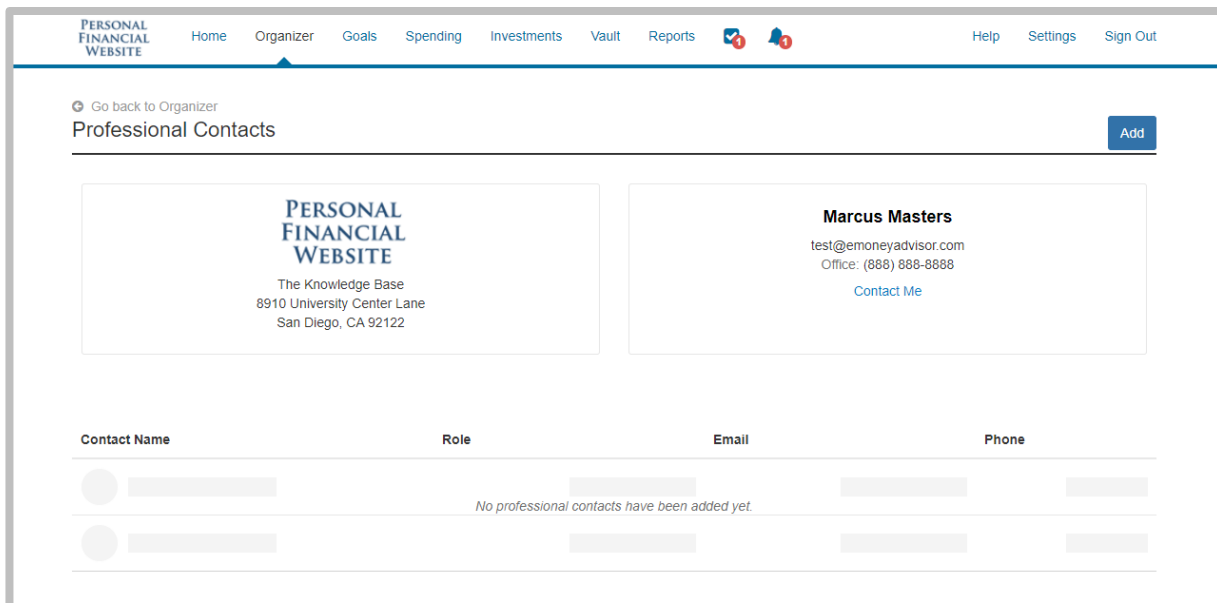
Risk Tolerance: used to define how much risk you are willing to accept. You can make changes to their answers at any time.

Organizer Overview

9. The organizer allows you to add any relevant documents to an entry by utilizing the **Documents** feature within certain organizer entries. You can either upload a document from your desktop, or tie an existing vault document to the entry. Anything uploaded through documents will automatically be added to your Shared Documents folder in the vault. Below screen shot is an example of the Documents section of a Taxable Investment.



10. **Professional Contacts** allows you to add information on key contacts. Your advisor will always be listed first in this section.



Organizer Overview

11. **Income, Expenses, and Savings** will contain your annual income, living expenses, and savings & contributions.

The screenshot shows the 'Income, Expenses, and Savings' section of the Personal Financial Website. The page has a navigation bar with 'Home', 'Organizer', 'Goals', 'Spending', 'Investments', 'Vault', 'Reports', 'Help', 'Settings', and 'Sign Out'. Below the navigation bar, there is a 'Go back to Organizer' link and the title 'Income, Expenses, and Savings'. The section is divided into three main areas: Annual Income, Annual Living Expenses, and Annual Contributions and Savings. Each area has an 'Add' button. The 'Annual Income' section contains a table with three entries: Frank's Earnings (\$300,000), Joanna's Hospital Pension (\$12,000), and Joanna's Part-Time Earnings (\$50,000). The 'Annual Living Expenses' section has an 'Add Itemized' button, an 'Estimate from Spending' button, and a text input field containing '\$140,000'. The 'Annual Contributions and Savings' section contains a table with two entries: 529 Plan for Lucas Contribution (\$8,000) and Joanna's 403B Contribution (\$33,250).

Income	Value
Frank's Earnings	\$300,000
Joanna's Hospital Pension	\$12,000
Joanna's Part-Time Earnings	\$50,000

Savings	Value
529 Plan for Lucas Contribution	\$8,000
Joanna's 403B Contribution	\$33,250

12. **Future Expenses** allows you to add retirement goals, education goals, and any major expense goals. Click Add to create a new goal.

The screenshot shows the 'Future Expenses' section of the Personal Financial Website. The page has a navigation bar with 'Home', 'Organizer', 'Goals', 'Spending', 'Investments', 'Vault', 'Reports', 'Help', 'Settings', and 'Sign Out'. Below the navigation bar, there is a 'Go back to Organizer' link and the title 'Future Expenses'. The section contains a 'Major Expenses' section with an 'Add' button and a table with one entry: Addition to House (\$80,000).

Major Expenses	Value
Addition to House	\$80,000

