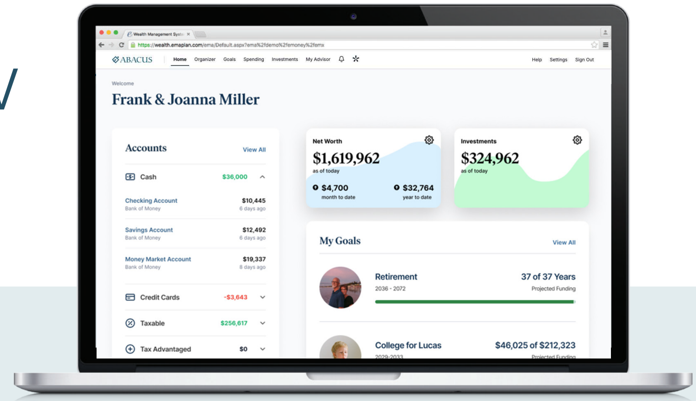
Planning Portal Overview

Manage Your Wealth *and* Your Well-being



8 Benefits in 3 Easy Steps

SEE THE BIG PICTURE
Connect all your accounts for a complete picture of your financial well-being, updated automatically each day.

FINANCIAL SNAPSHOT
Get a breakdown of what you own, what you owe, and how your savings are impacted.

INVESTMENTS
With interactive charts and detailed views, monitor all your accounts in one place.

BUDGETING TOOLS
See how much you spend, where your money is going, and monitor your savings goals.

MOBILE
Your Planning Portal can be accessed on iPhone, Android, and other popular smartphones.

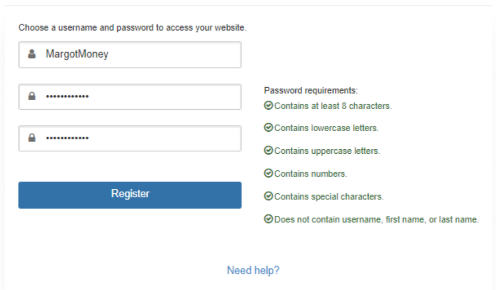
SECURITY
Safely store and access your most critical financial information.

GOALS
Define goals, track your progress, and easily prioritize your most important financial objectives.

FUTURE EXPENSES
Identify major expenses you expect to incur and we'll help you build a plan to cover anticipated costs.

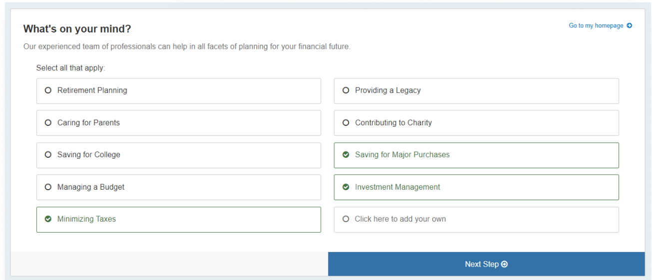
STEP 1
Register for Your Planning Portal

Click the link sent to your inbox to get started. Then, create your own secure user name and password.



STEP 2
Complete the Series of Introductory Questions

Answer a few basic questions to help us understand your current finances and future goals.



STEP 3
Connect Your Financial Accounts

From your Homepage, click on **Organizer**, then **Accounts** to start adding your financial institutions, like bank and credit accounts. *Refer to the Adding Accounts section of this guide for additional details.*