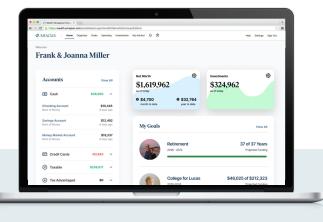
# **ABACUS**

### PLANNING PORTAL GUIDE

## 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.

#### MOBILE

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

#### FINANCIAL SNAPSHOT

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

#### SECURITY

Safely store and access your most critical financial information.

#### INVESTMENTS

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

#### GOALS

Define goals, track your progress, and easily prioritize your most important financial objectives. **BUDGETING TOOLS** 

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

#### FUTURE EXPENSES

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

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#### **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.

Complete the Series of Introductory Questions

Answer a few basic questions to help us understand your

# Register © Contains special characters. © Does not contain username, first name, or last name. Need help? What's on your mind? Construction of proteomers Select all that apply: © Retrement Planning © Contribuding to Charity © Swing for Collegie © Managing a Budget © Interment Management © Interment Management © List Interior Taxes Not Starg @

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#### STEP 3

STEP 2-

#### Connect Your Financial Accounts

current finances and future goals.

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.*