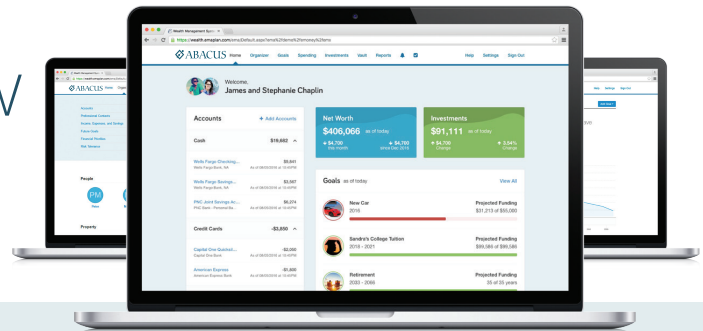


## Planning Portal Overview

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.

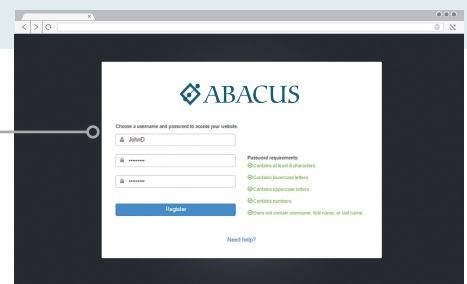
### FUTURE EXPENSES

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

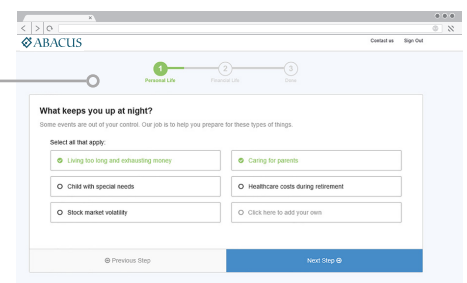
Click the link sent to your inbox to get started. Then, create your own secure user name and password.



## 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.*