PERSONAL FINANCIAL VIEW®
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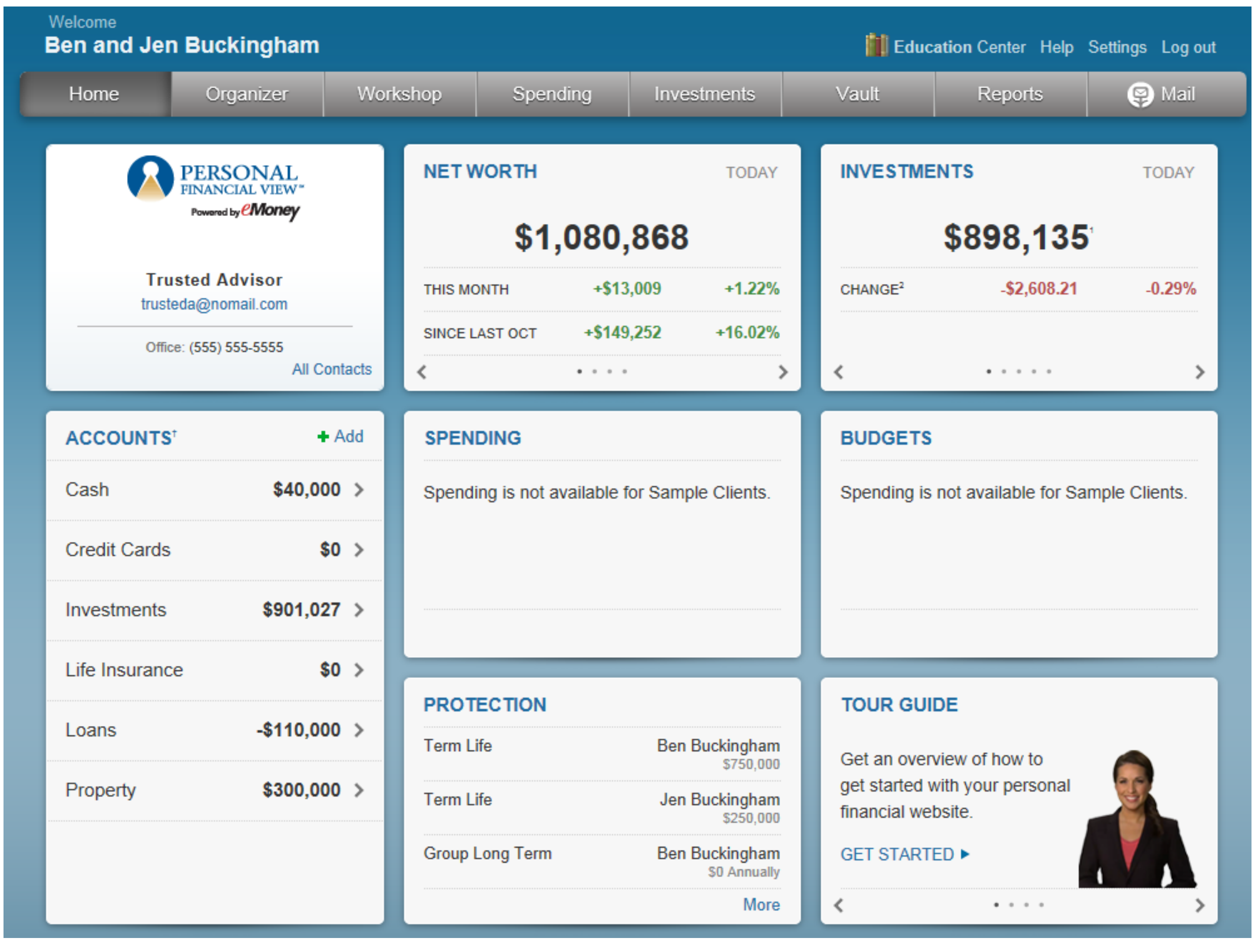
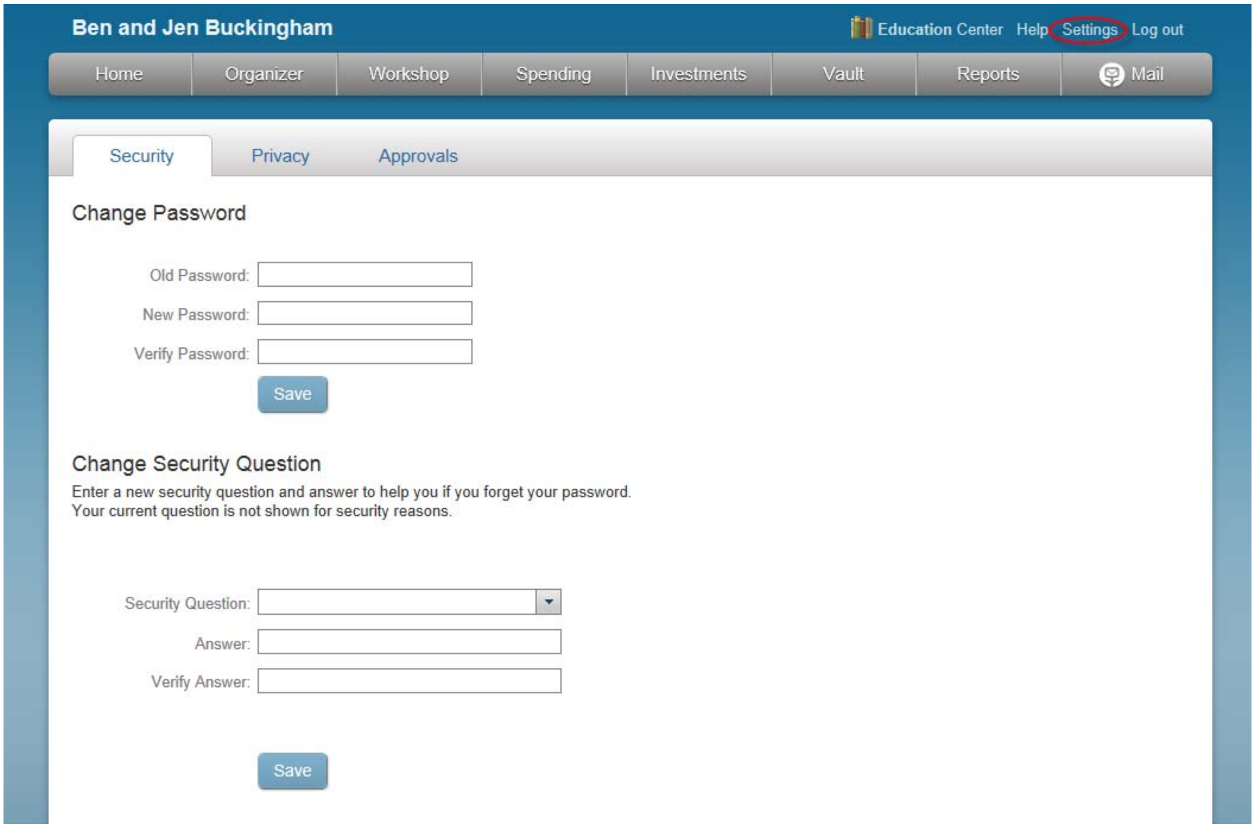
Client Site Overview Guide

This training guide will demonstrate the **Client Website Overview**. Your Client Website is your own Personal Financial Website that will provide you with a consolidated view of your financial information.

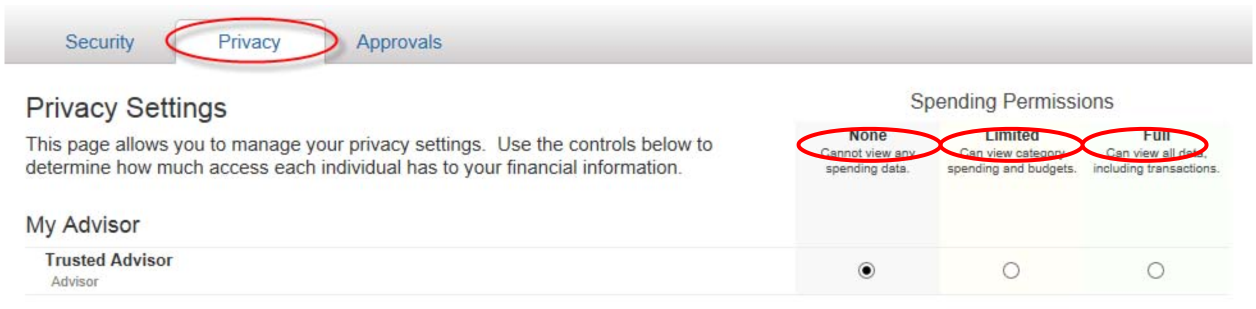
There are many features such as the **Organizer**, **Workshops**, **Budgeting**, **Reports**, and the **Vault** (an online safe deposit box to store digital copies of valuable personal documents such as wills, trusts, passport information, photos, etc.).



1. You are able to set security & privacy **Settings**.



2. The **Privacy** tab allows you to control your Advisor's access.

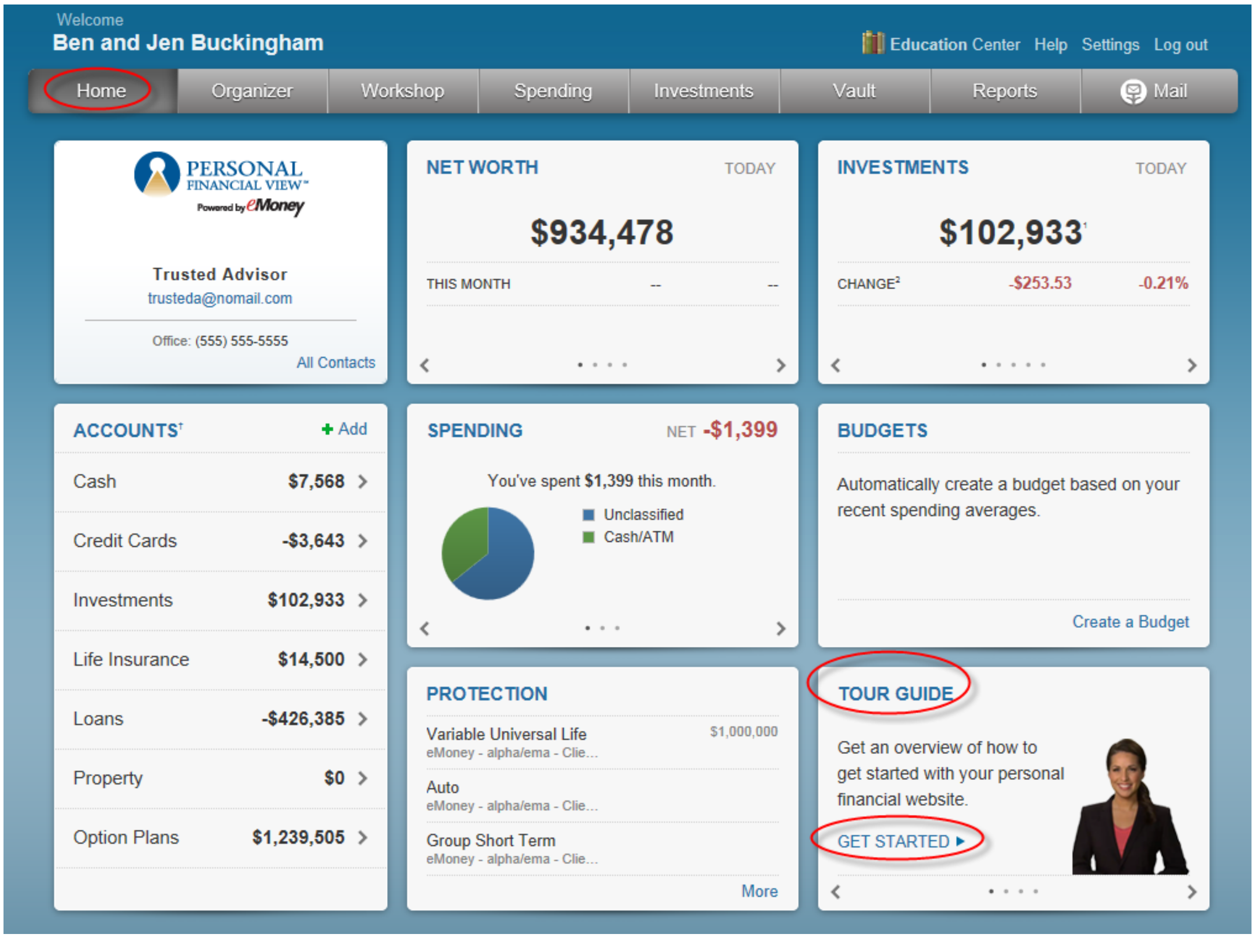


None – Your Advisor will not have access to any of your spending data.

Limited - Your Advisor has limited access to your spending details and can view only the categories regarding the spending and budget:

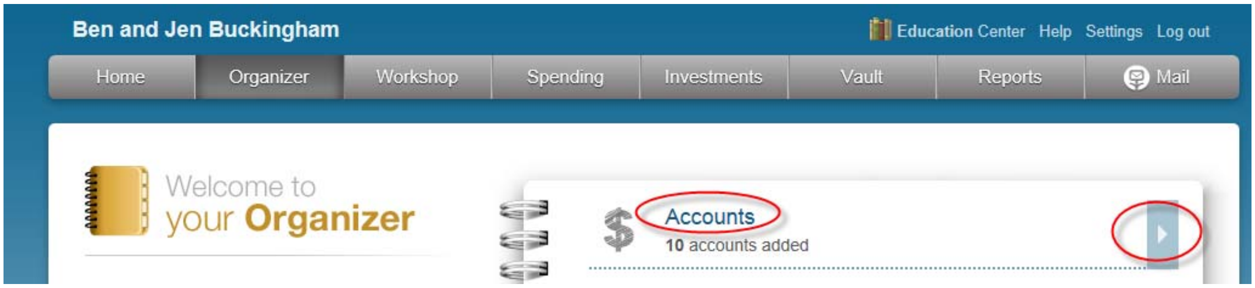
Full access - Your Advisor can view spending and budgeting items, including transactions.

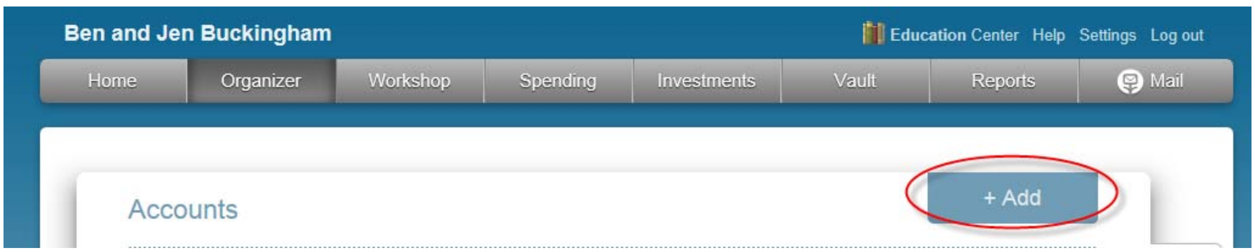
3. The Tour Guide gives you an overview of your Personal Financial Website

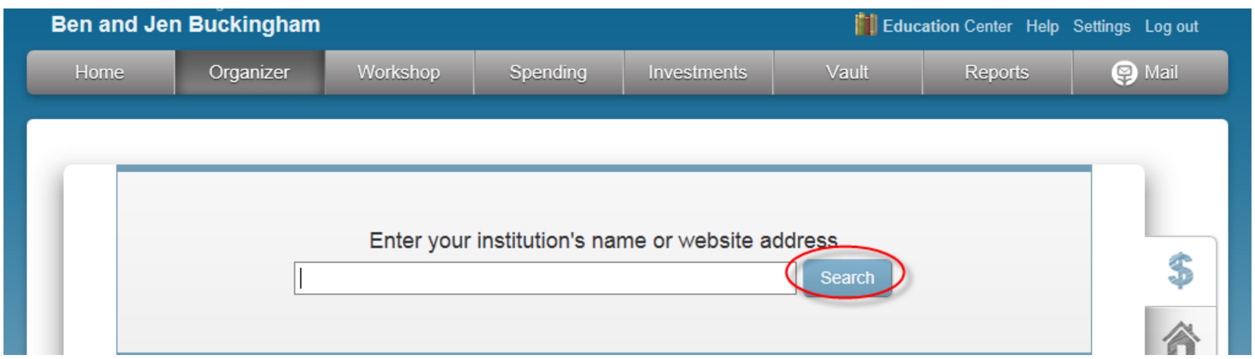


4. The **Organizer** tab gives you a place to enter your data, provided your Advisor has enabled this feature for you.

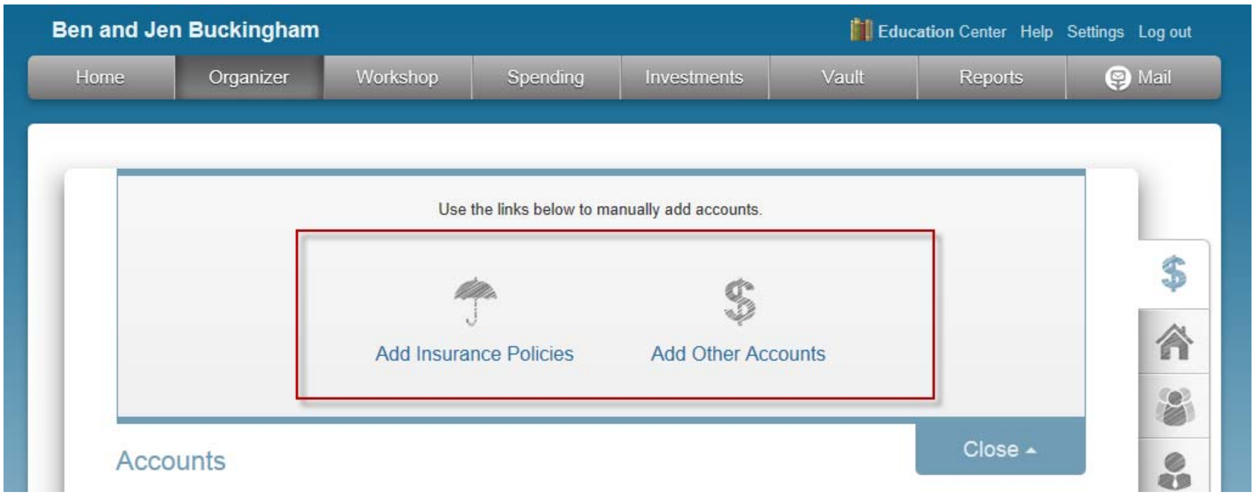
5. From the **Add Accounts** drop down you can search for an institution by name or web address.





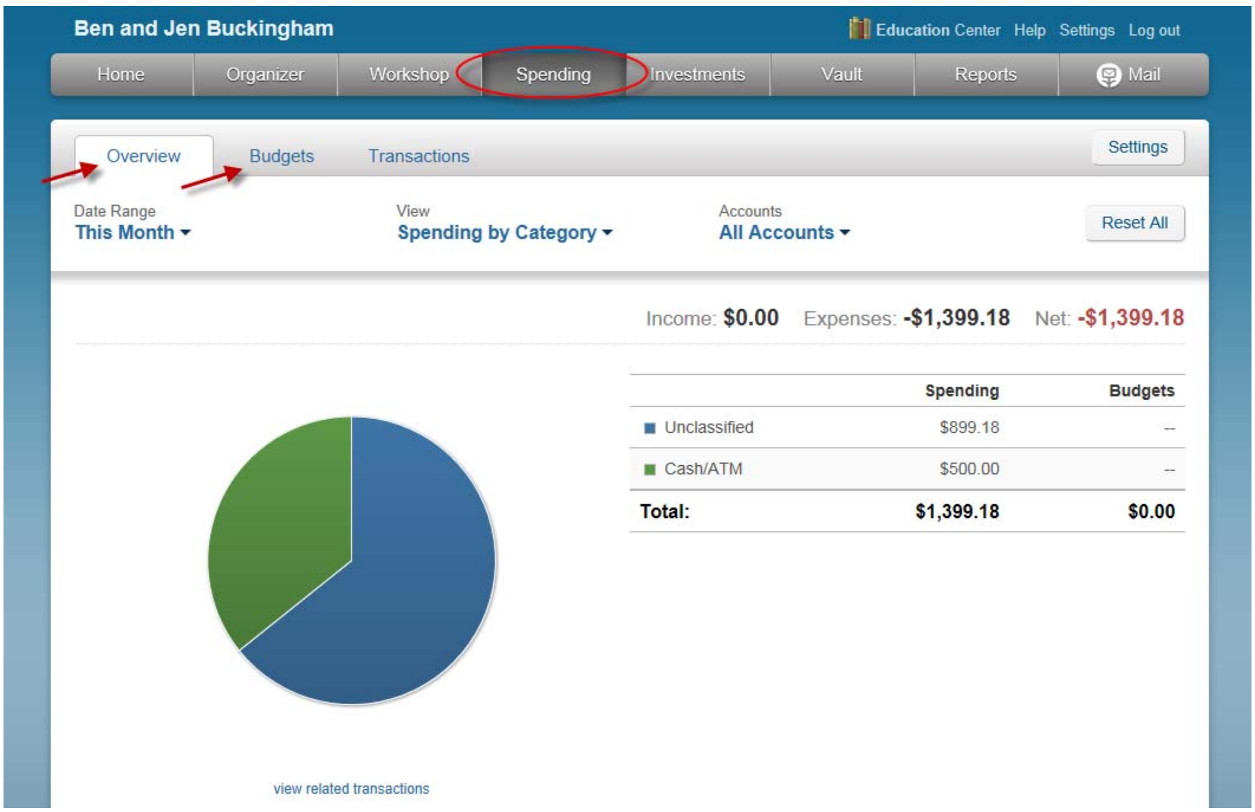


6. To **manually** enter data, select from the appropriate categories highlighted below.



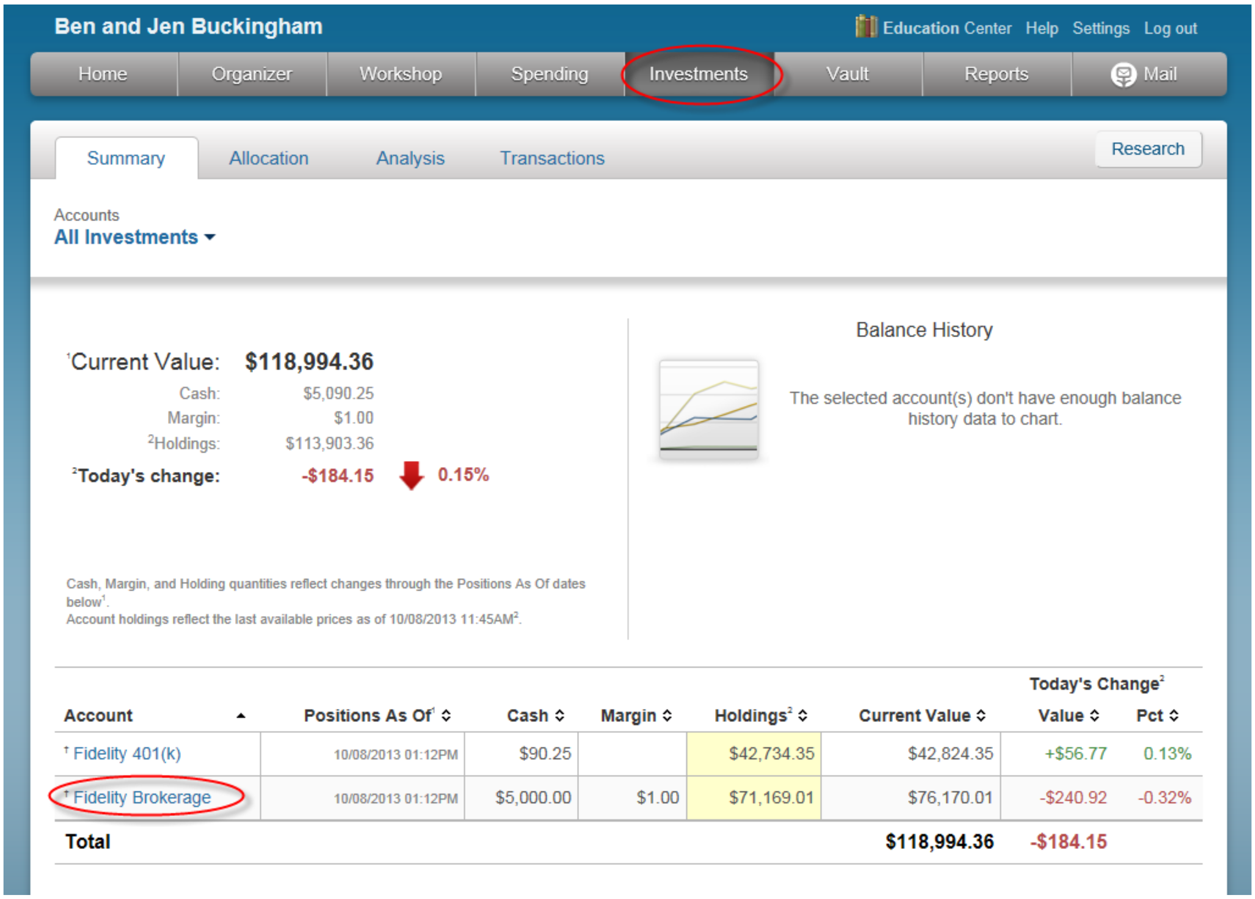
Note: For more information on connecting accounts see the ***Client Site Connection Guide****.*

7. The **Spending** tab allows you to track your spending habits and build a custom budget.
   a. The **Overview** tab provides a pie chart based off of recent transactions imported from aggregated accounts.
   b. The **Budget** window is a snapshot that allows you to monitor if you are on track with your monthly budget.

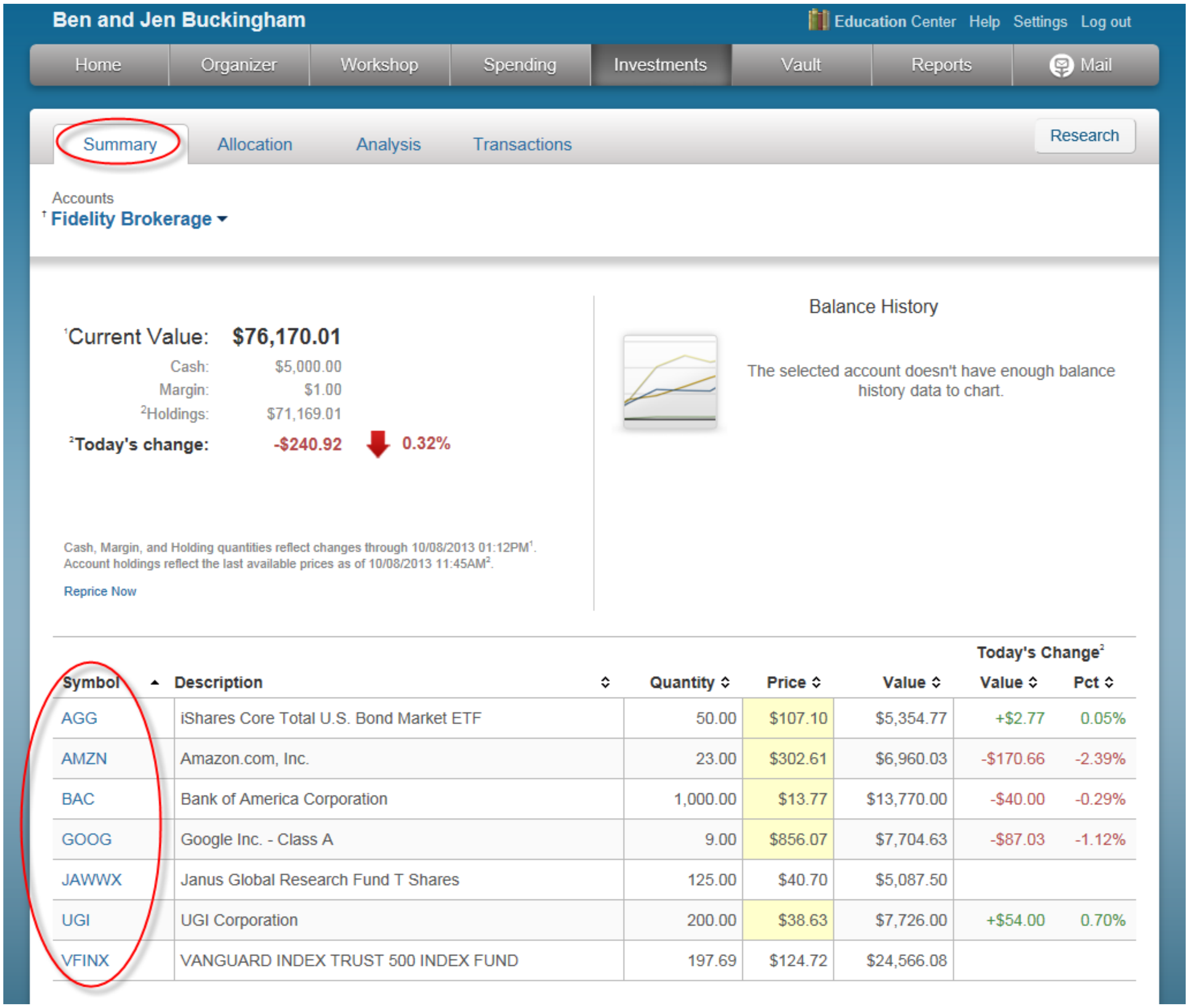


Note: For detailed information on how the budgeting & transaction features work, please refer to the ***Client Site Budgeting*** *user guide.*

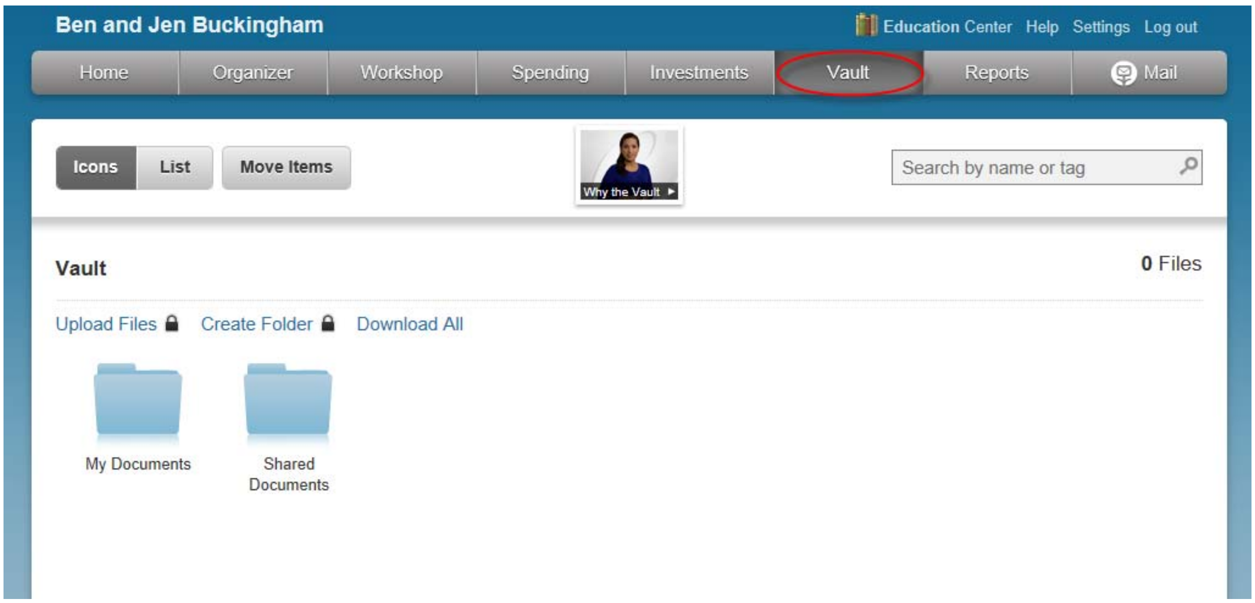
8. The **Investments** tab allows you to view up to date market information based off of any aggregated investments.



9. Click on the Account Name to see a holdings break down of a given account.

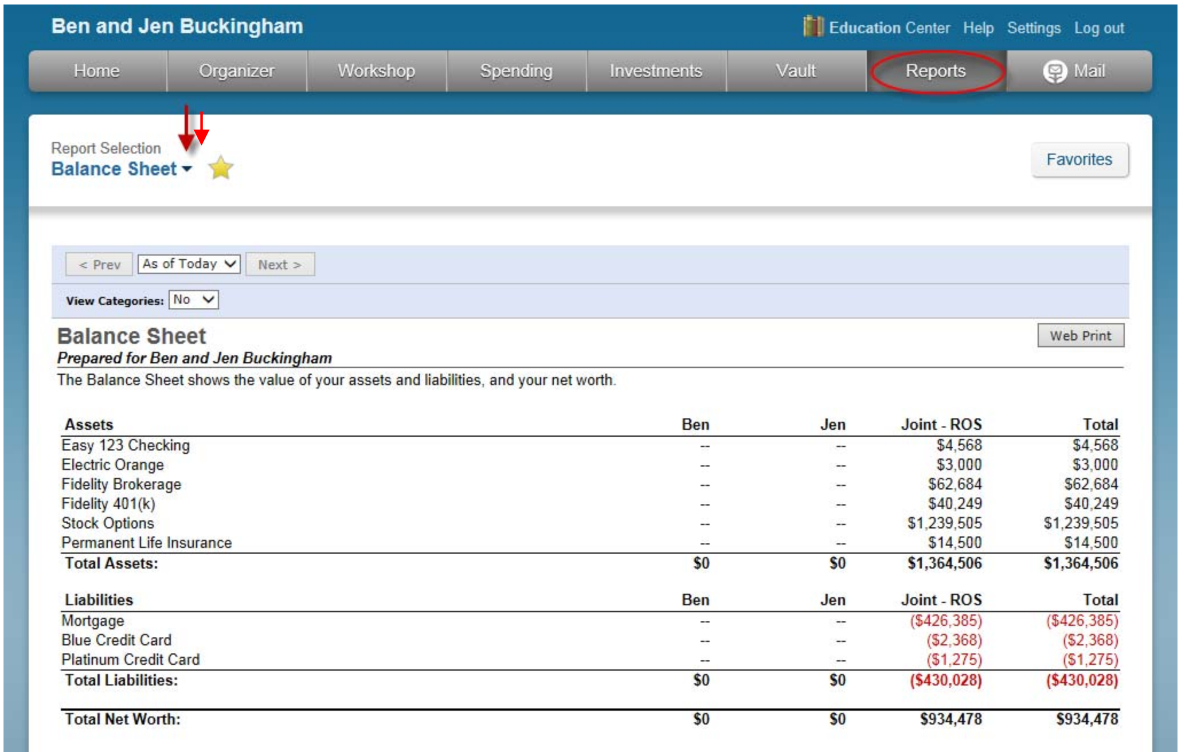


10. The **Vault** provides secure storage for valuable personal documents (**wills, trusts, insurance documents, passports, etc.**) in electronic format.
    a. You can upload documents into the **Shared Documents** folder allowing the advisor to also view the contents.
    b. You can upload documents into the **My Documents** folder which is a private folder where only *your access* can view the contents.



Note: The Vault allows you to store files of the following types: aifc, aiff, aif, au, avi, bmp, doc, gif, jpg, jpeg, mov, mp3, mpeg, mpg, pdf, png, ppt, ps, rtf, snd, swf, tax, tif, tiff, txt, wav, wma, wmv, wps, xls, and xml.

11. The **Reports** tab provides you with a series of statements about your financial situation. To view a report, simply choose from the drop down list located under Report Selection.

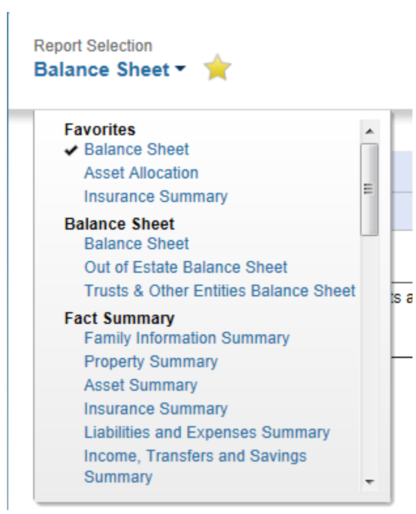


Balance Sheet

Prepared for Ben and Jen Buckingham

The Balance Sheet shows the value of your assets and liabilities, and your net worth.

Assets	Ben	Jen	Joint - ROS	Total
Easy 123 Checking	--	--	$4,568	$4,568
Electric Orange	--	--	$3,000	$3,000
Fidelity Brokerage	--	--	$62,684	$62,684
Fidelity 401(k)	--	--	$40,249	$40,249
Stock Options	--	--	$1,239,505	$1,239,505
Permanent Life Insurance	--	--	$14,500	$14,500
Total Assets:	**$0**	**$0**	**$1,364,506**	**$1,364,506**
Liabilities	**Ben**	**Jen**	**Joint - ROS**	**Total**
Mortgage	--	--	($426,385)	($426,385)
Blue Credit Card	--	--	($2,368)	($2,368)
Platinum Credit Card	--	--	($1,275)	($1,275)
Total Liabilities:	**$0**	**$0**	**($430,028)**	**($430,028)**
Total Net Worth:	**$0**	**$0**	**$934,478**	**$934,478**



12. The **Awards** tab is a free service that allows you to track Frequent Flyer miles, Hotel Award points, Credit Card Awards, and other points programs.
    a. By signing up for access you can track your awards on the web. You can also receive statements & alerts via-email.
    b. To enroll, click the **GO TO AWARDS** link shown on the **Home** page.