Colman Knight

YOUR INTEGRAL WEALTH PORTAL

# A Guide to Getting Started

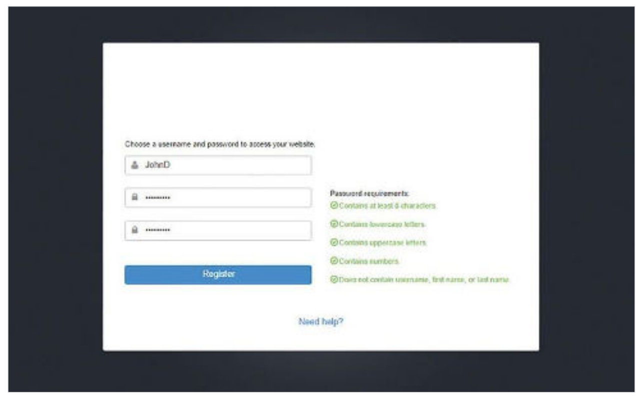
## Manage your wealth and your well-being

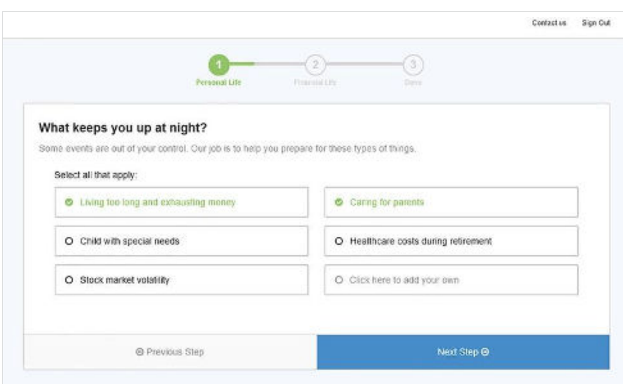
Your Integral Wealth Portal helps you see your financial life beyond the numbers. And with our automated fact-finding questionnaire, you can get started with your Integral Wealth Portal on your own in just a few easy steps.

STEP 1

### Register for your financial website

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




STEP 2

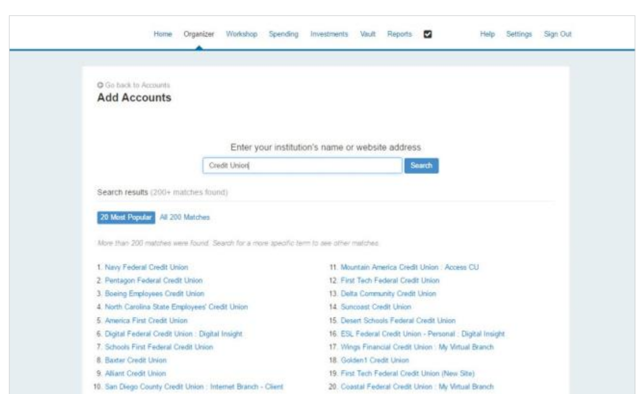
### Complete the series of introductory questions

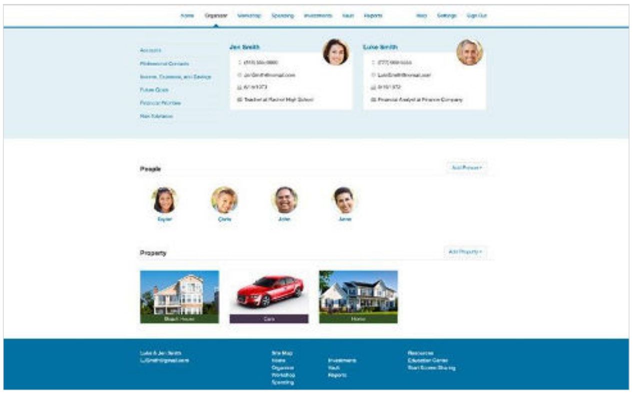
Answer a few basic questions to help us understand your current finances and future goals.

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.





STEP 4

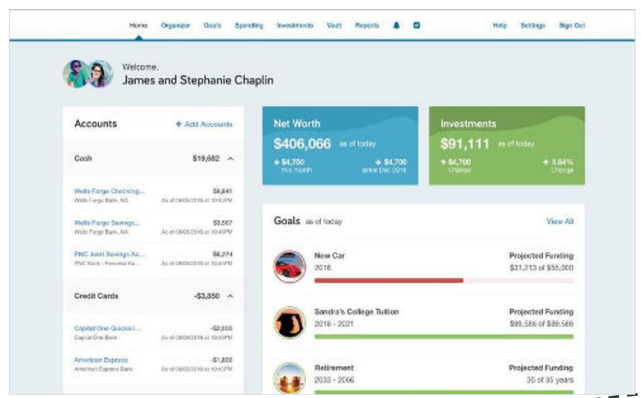
## Personalize your portal

Customize your portal by adding photos of what your wealth represents—the people and things most important in your life.

STEP 5

## See your finances come to life

Easily organize and track your financial goals with spending and budgeting tools, investment monitoring, and more.




## Now you're ready to start managing your wealth with your Integral Wealth Portal!

By combining our personal digital experience with the professional guidance only a trusted advisor can provide, we can work together to build and monitor a financial plan that fits your needs.