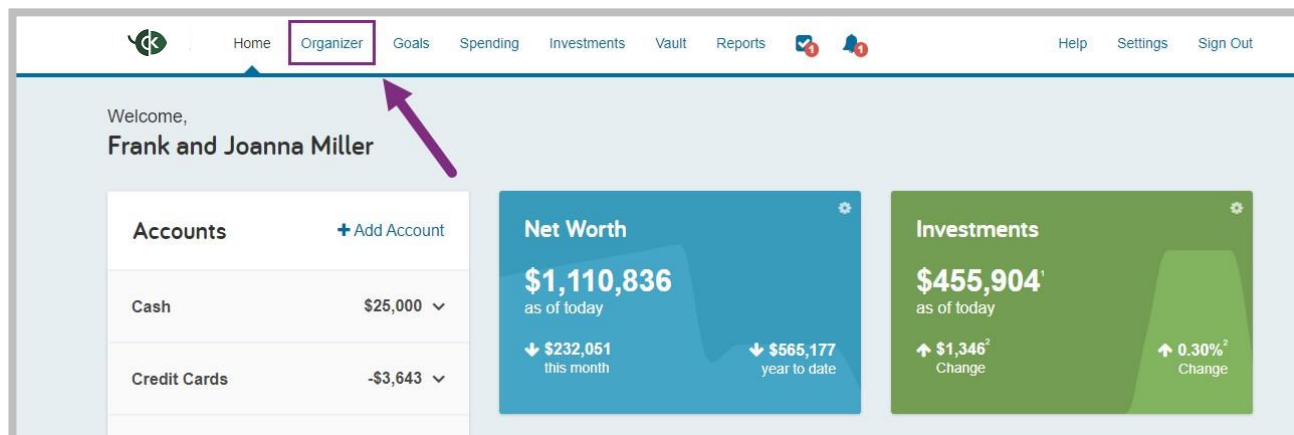


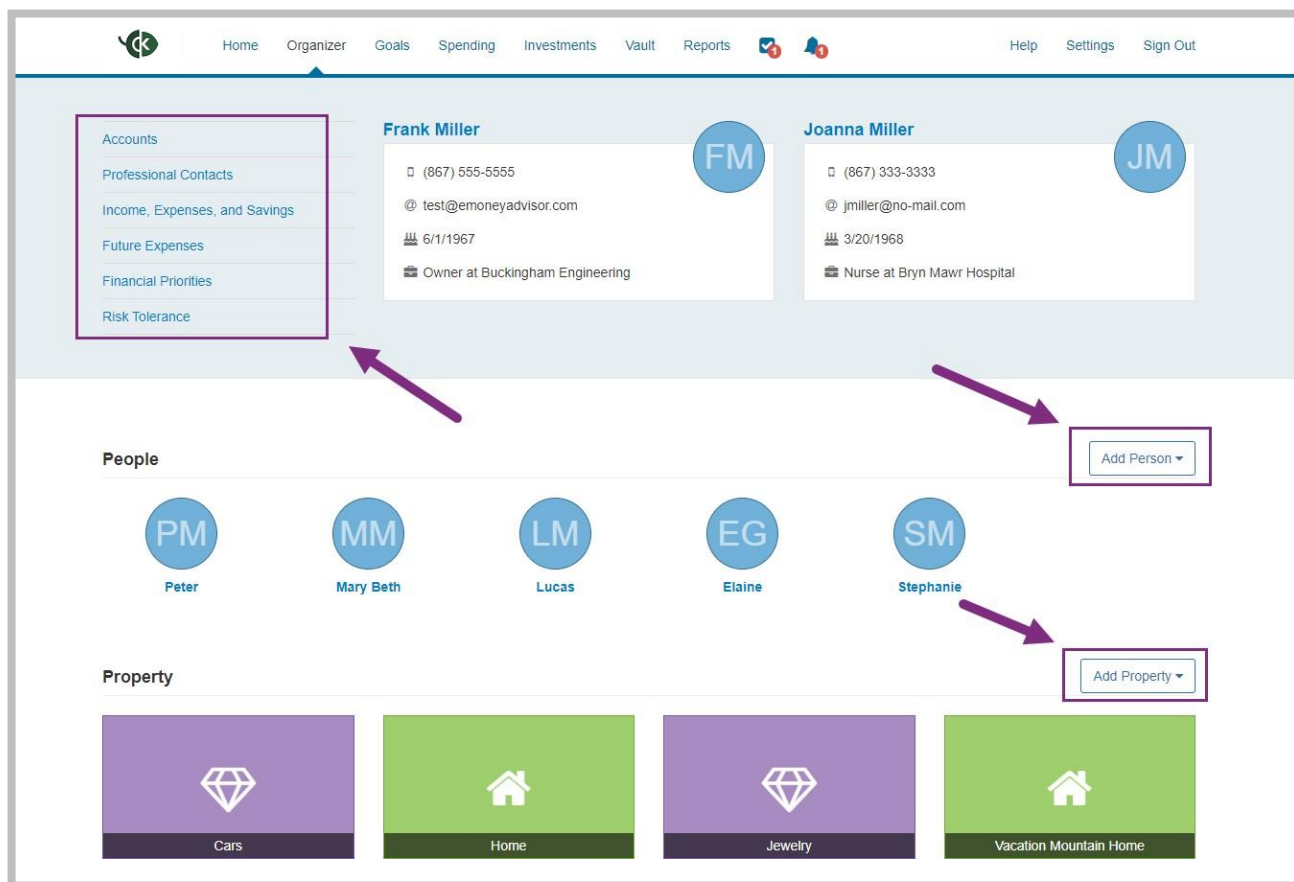
Organizer Overview

In this guide we will walk you through the features of your Integral Wealth Portal **Organizer**. Use the Organizer to group all your financial information in one place. Click the different sections to add and edit the related information. The information included here will be used to populate other areas of the application, including the Home page.

1. To access, click the **Organizer** tab from the toolbar.

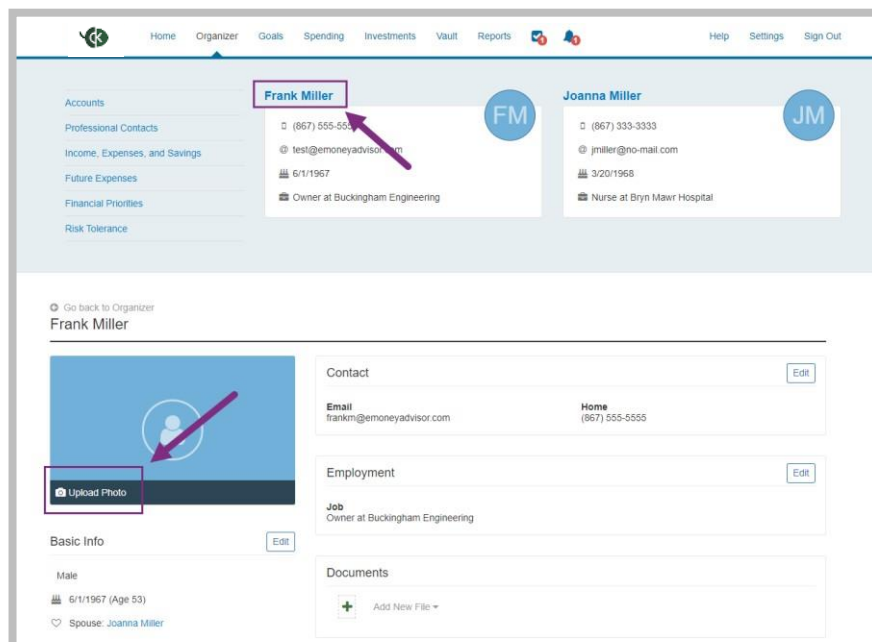


2. The Organizer allows you to group all of your financial information in one place as seen below.

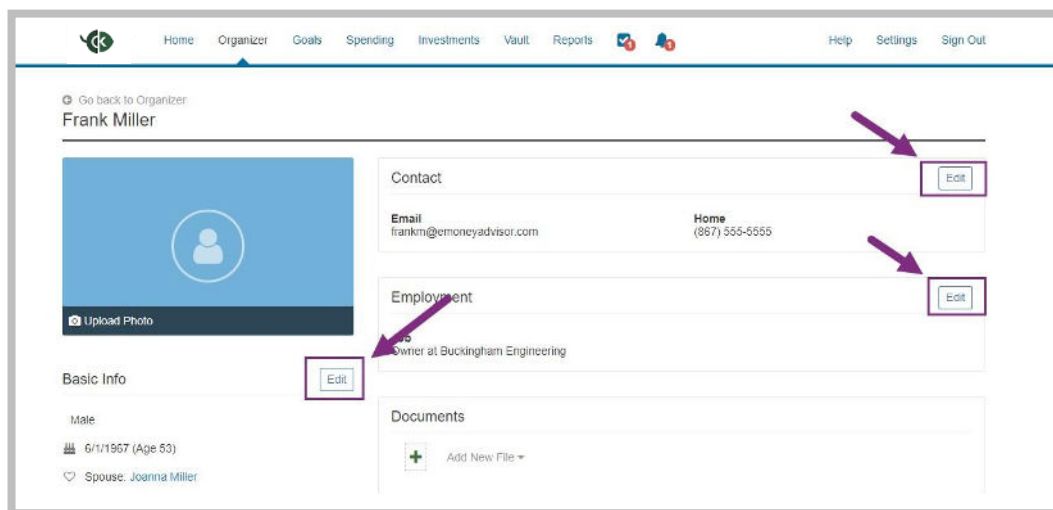


Organizer Overview

- To modify any of your personal information or upload a profile picture to your Portal, click your name. To upload a picture, click **Upload a Photo** and search directly from the computer's hard drive.



- After clicking into your profile, you and your spouse can edit Basic Info, Contact and Employment Info and also upload relevant documents to your online vault.



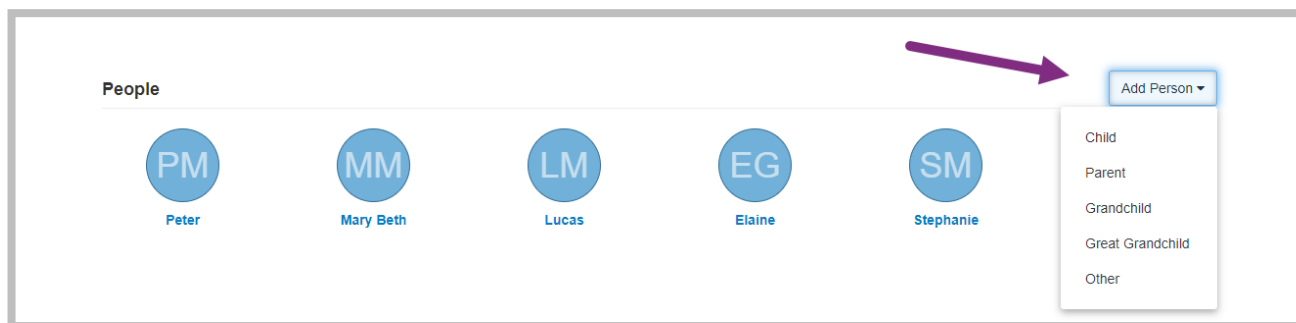
Basic Info: First & Last name, DOB, Gender, Special Needs, In Good Health, and Marital Status

Contact Info: Email, Phone, Mobile Phone, Fax, and Full Address. Note that only the Mobile Phone number is what will display on the organizer overview.

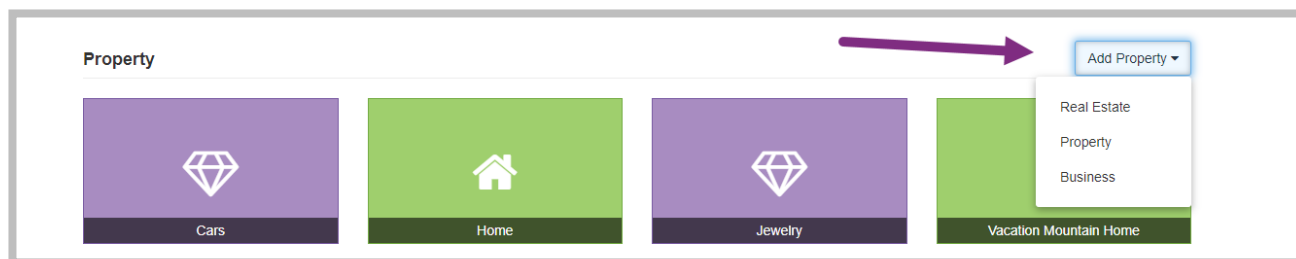
Employment Info: Employer Name, Job Title, Email

Organizer Overview

5. On the organizer main tab, you will also be able to add relevant **People** and **Property**.
6. To add a person, click **Add Person** and choose what to add & enter details. You can upload a picture of each person on their individual page.

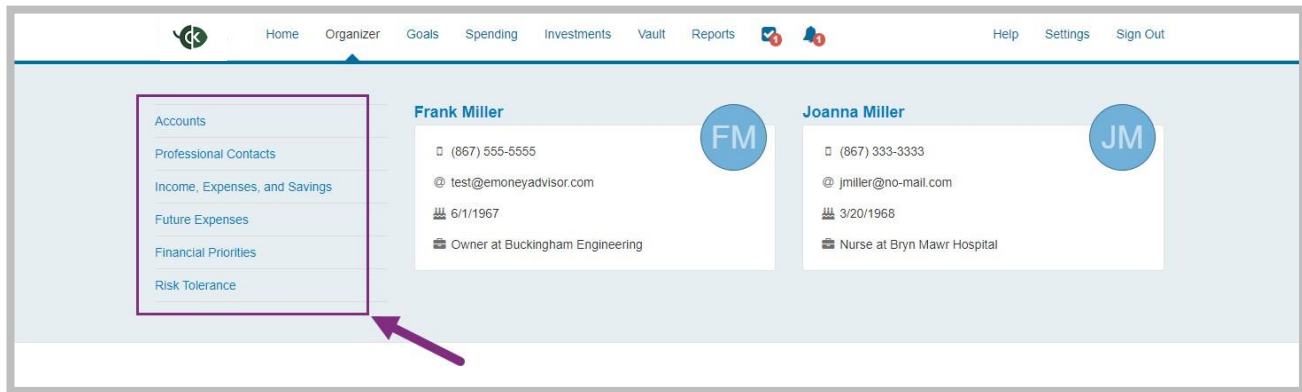


7. To add property, click **Add Property** and select Real Estate, Property, or Business.



Organizer Overview

8. The menu options on the upper left side of the organizer tab lists out the available sections the client can view and/or modify. Click an item to view its details. Click **Add** to add information within a section, and click **Save** to save the changes.



Accounts: allows you to add your online accounts directly from an institution or to add them manually. Click the Add button at the top of the page to enter your institution's name or to select the icons to add insurance policies and other accounts that are not connected to your institutions.

Professional Contacts: allows you to add information about any relevant contacts. Colman Knight will always be listed first in this section. Click Add, and then add contact information.

Income, Expenses, and Savings: contains your annual income, living expenses, and savings and contributions.

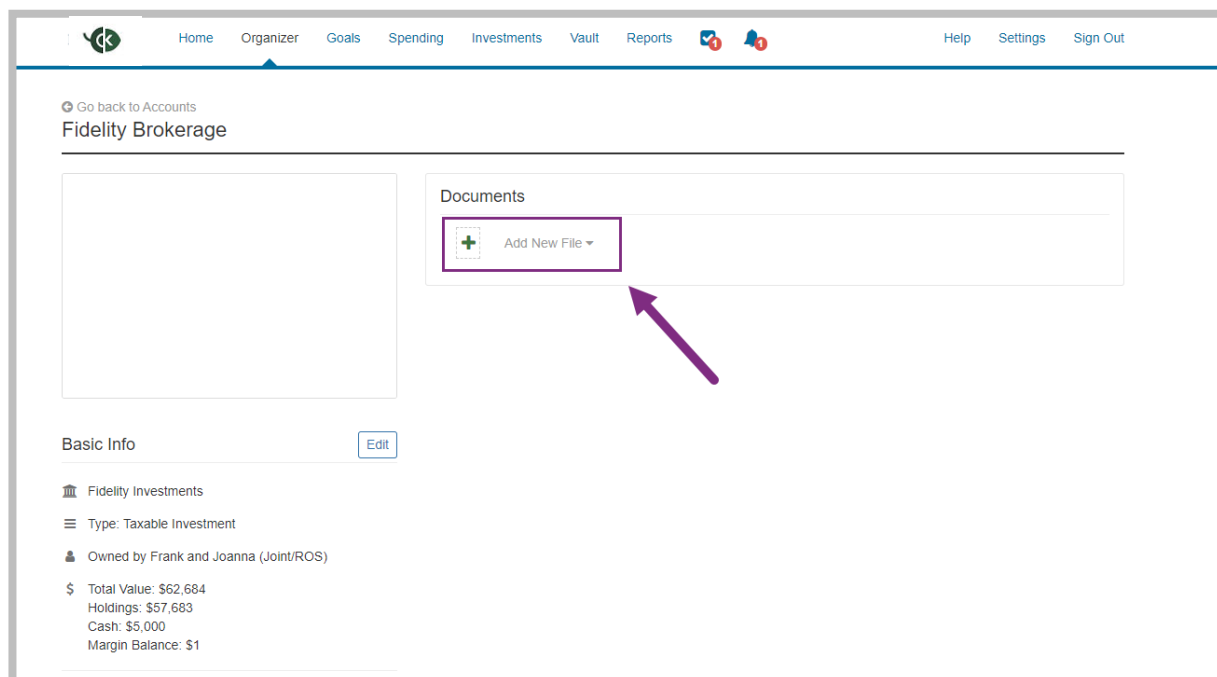
Future Goals: allows you to enter in an assumed age of retirement, view existing or add education goals, and any existing or new major expenses.

Financial Priorities: used to assign an order to your financial goals. Client and Spouse can prioritize their goals.

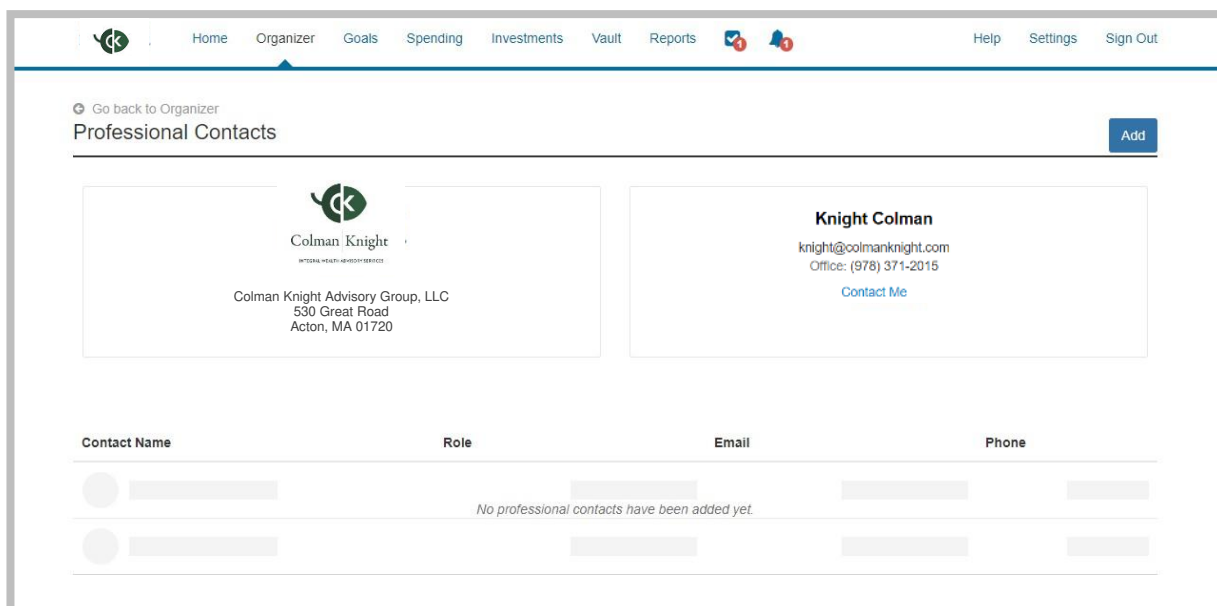
Risk Tolerance: used to define how much risk you are willing to accept. You can make changes to their answers at any time.

Organizer Overview

9. The organizer allows you to add any relevant documents to an entry by utilizing the **Documents** feature within certain organizer entries. You can either upload a document from your desktop, or tie an existing vault document to the entry. Anything uploaded through documents will automatically be added to your Shared Documents folder in the vault. Below screen shot is an example of the Documents section of a Taxable Investment.

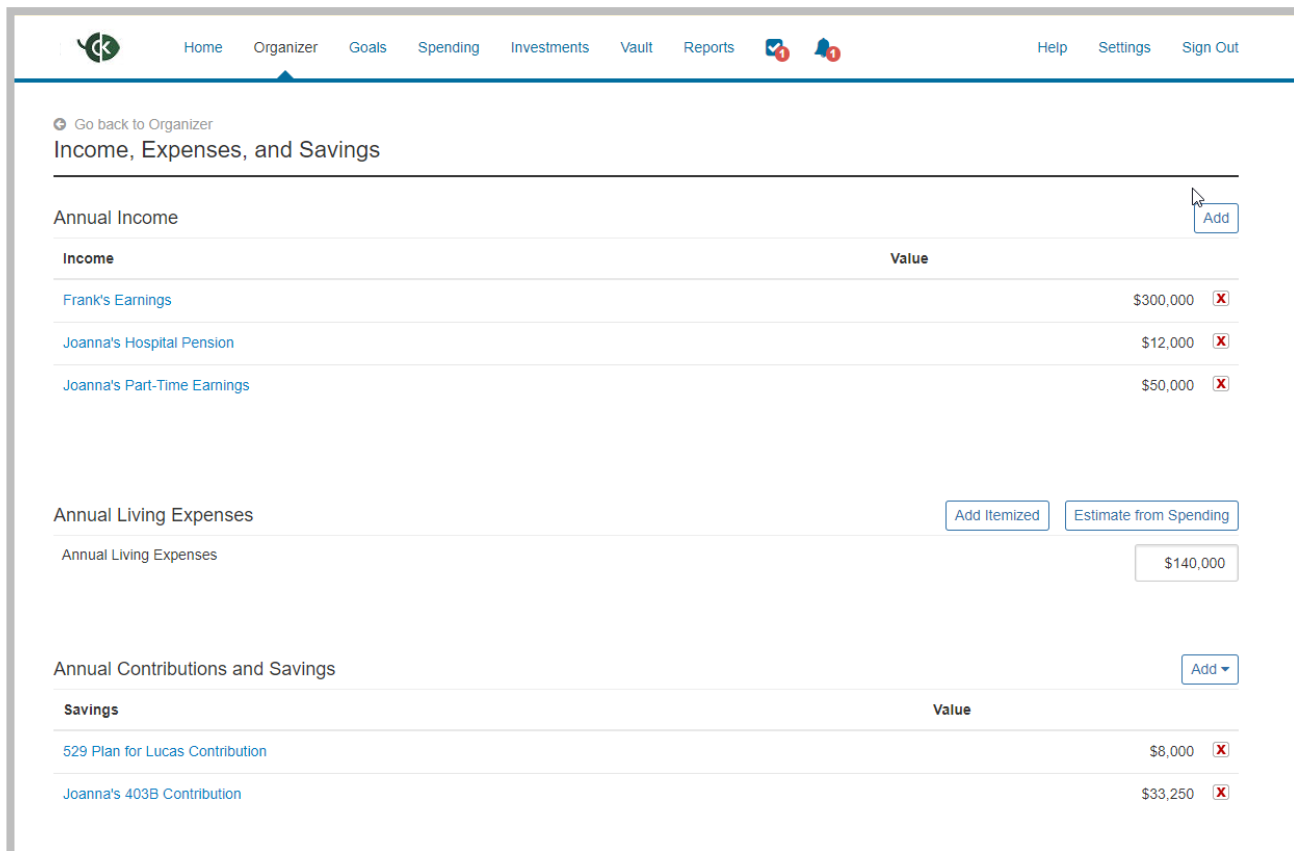


10. **Professional Contacts** allows you to add information on key contacts. Your advisor will always be listed first in this section.



Organizer Overview

11. **Income, Expenses, and Savings** will contain your annual income, living expenses, and savings & contributions.



Go back to Organizer

Income, Expenses, and Savings

Annual Income Add

Income	Value
Frank's Earnings	\$300,000 ✕
Joanna's Hospital Pension	\$12,000 ✕
Joanna's Part-Time Earnings	\$50,000 ✕

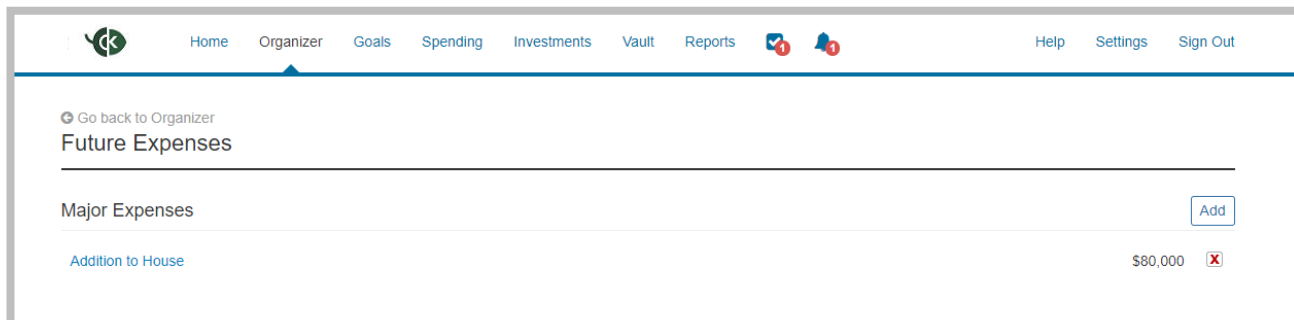
Annual Living Expenses Add Itemized Estimate from Spending

Annual Living Expenses \$140,000

Annual Contributions and Savings Add

Savings	Value
529 Plan for Lucas Contribution	\$8,000 ✕
Joanna's 403B Contribution	\$33,250 ✕

12. **Future Expenses** allows you to add retirement goals, education goals, and any major expense goals. Click Add to create a new goal.



Go back to Organizer

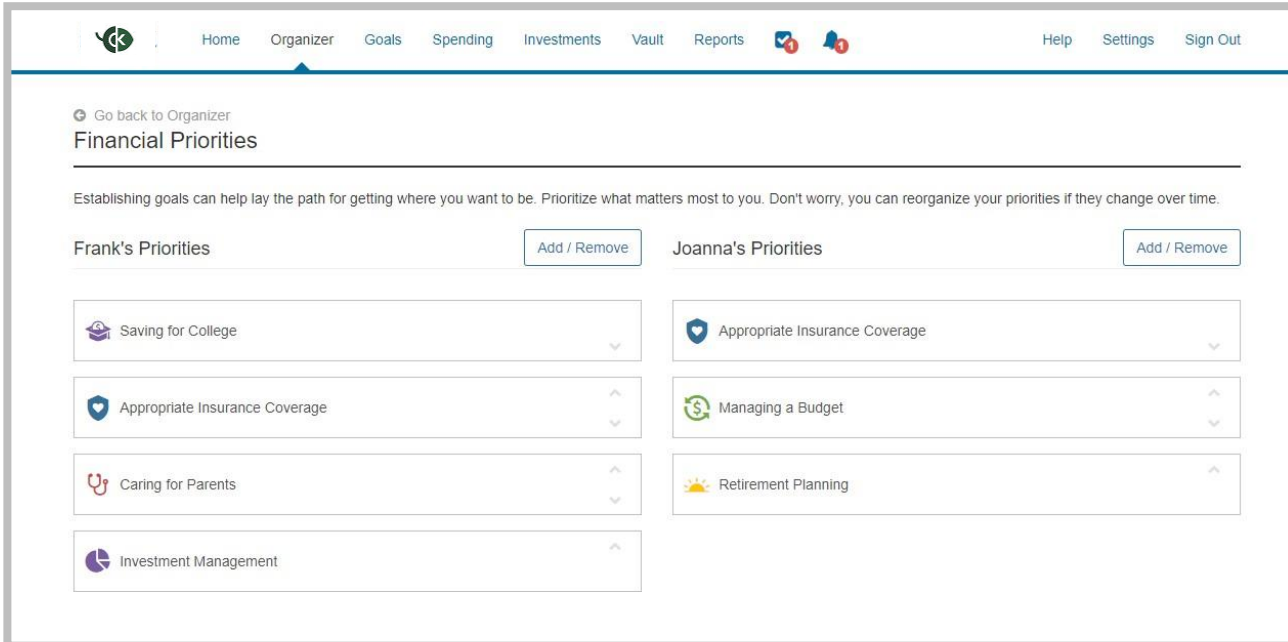
Future Expenses

Major Expenses Add

Addition to House \$80,000 ✕

Organizer Overview

13. **Financial Priorities** are used to help create an accurate view of your plans regarding your finances. Here you can assign an order to their financial goals.



The screenshot shows the 'Financial Priorities' section of the Integral Wealth Portal. The navigation bar at the top includes Home, Organizer (selected), Goals, Spending, Investments, Vault, Reports, and Help. The main content area has a 'Go back to Organizer' link and a title 'Financial Priorities'. Below the title is a descriptive text: 'Establishing goals can help lay the path for getting where you want to be. Prioritize what matters most to you. Don't worry, you can reorganize your priorities if they change over time.' The interface is divided into two columns: 'Frank's Priorities' and 'Joanna's Priorities', each with an 'Add / Remove' button. Frank's list includes 'Saving for College', 'Appropriate Insurance Coverage', 'Caring for Parents', and 'Investment Management'. Joanna's list includes 'Appropriate Insurance Coverage', 'Managing a Budget', and 'Retirement Planning'. Each item is represented by an icon and a text label, with up and down arrows for reordering.

14. **Risk Tolerance** provides a 12-question questionnaire. You will need to answer all 12 questions in full to see your risk score.

