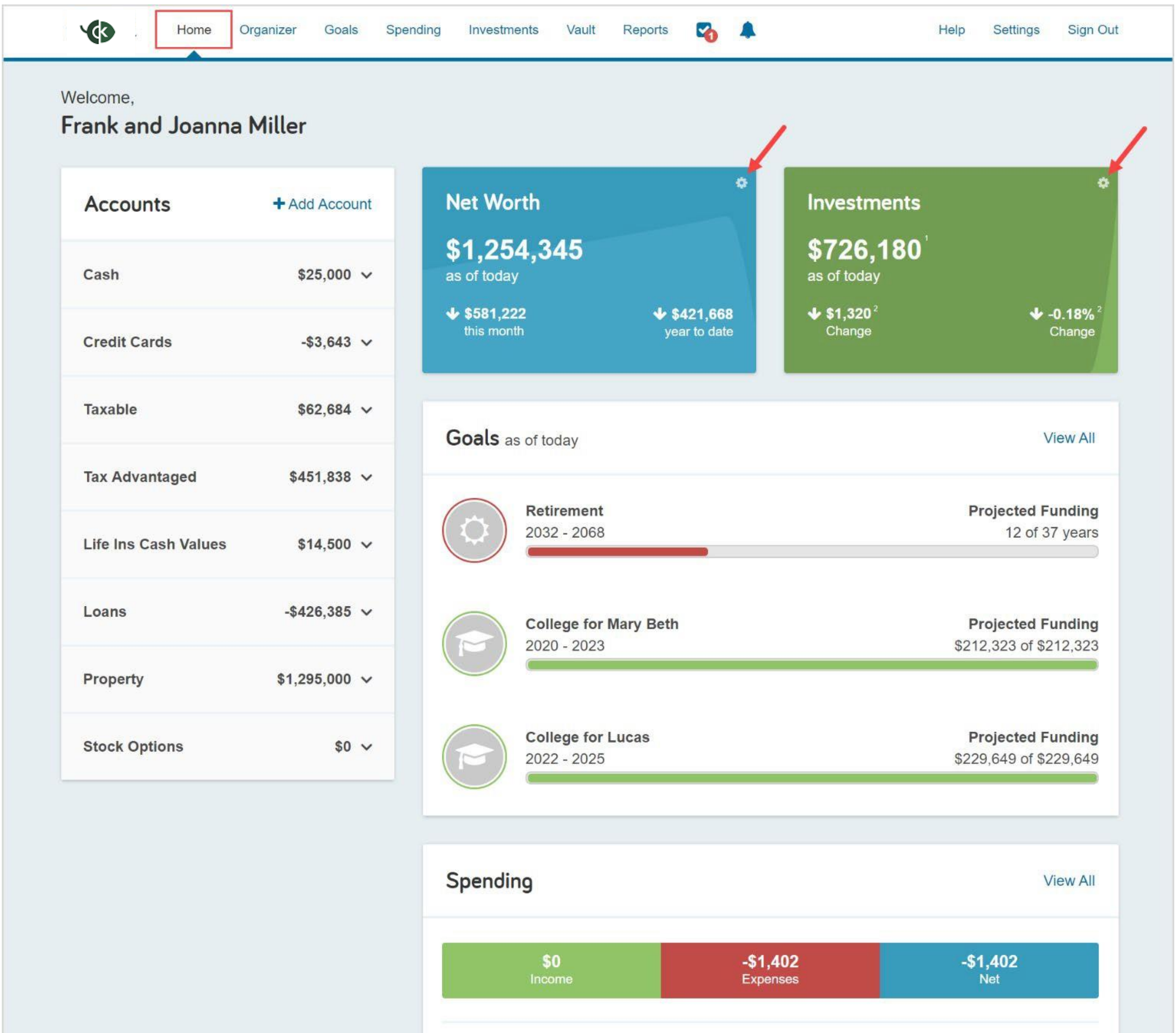
Portal Overview

This user guide will provide an overview of the features on your Integral Wealth Portal. Your Portal is designed to give you the tools to organize your financial life and help you stay connected with your finances in one simple consolidated view.

Before your first login, you will be prompted to establish three security questions and set up 2-Factor Authentication.

Your **Home** page is a living snapshot of your financial wellbeing, providing a high-level view of your financial information. This page is divided into separate tiles that represent the information contained within a section of the website. Begin customizing your experience by clicking the **gear icon** in your Net Worth and Investments tiles.



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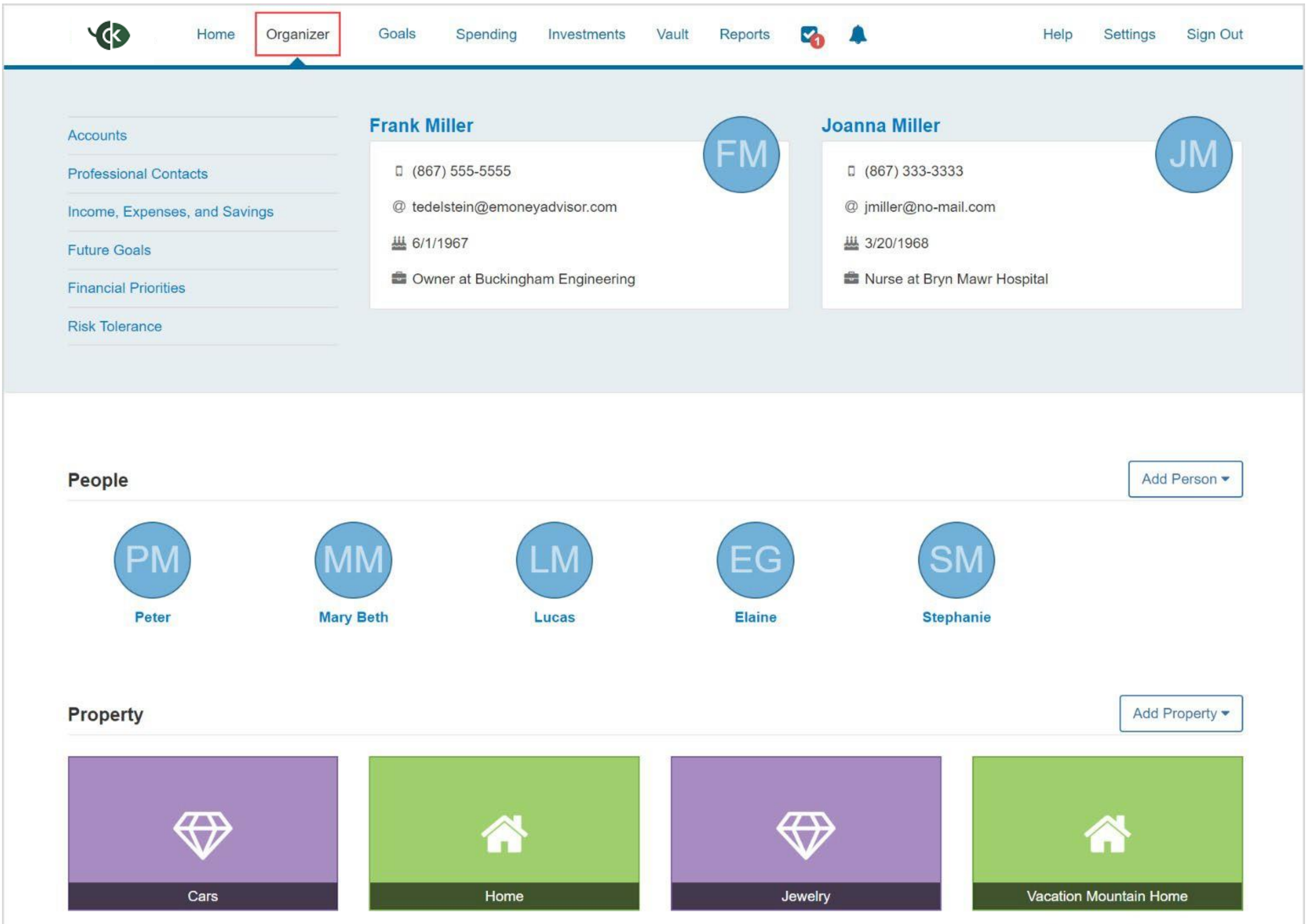
The **Organizer** will help you to consolidate all your important financial information into one place. You can click the **sections** on the left-hand side to add your accounts, financial data, people and property. The information within the Organizer will be used to populate other areas of the website, including the Home page.



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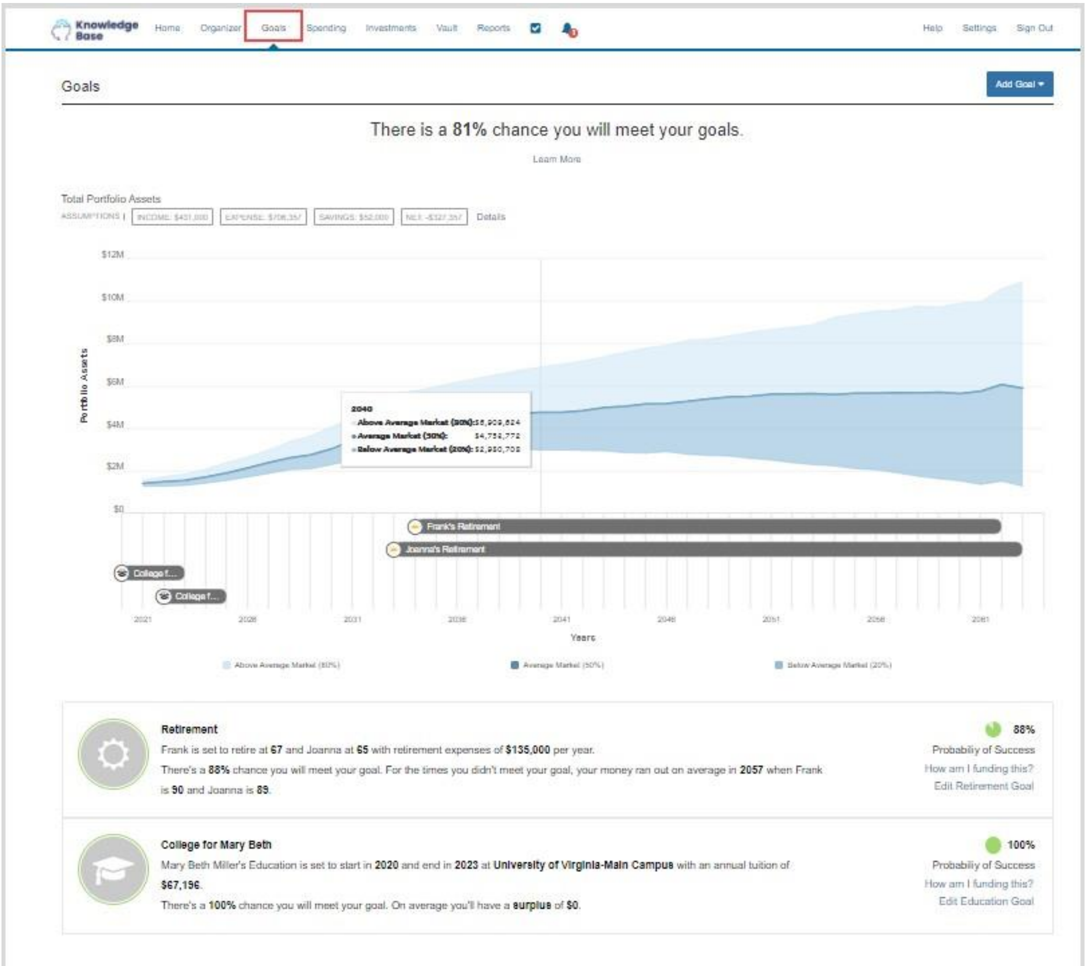
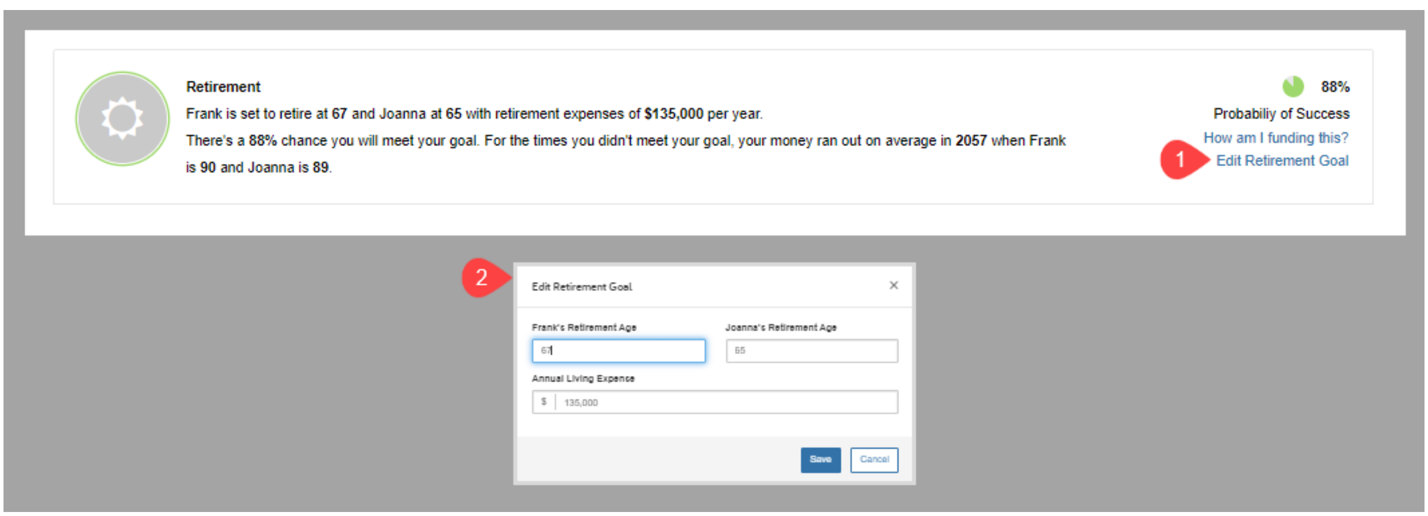
The **Goals** page allows you to track your Goals overtime and view the impact they have on your overall financial situation. Clicking into a Goal provides insight into projected costs, funding, and suggested actions to improve your results. Note that the chart displayed may differ depending on Colman Knight's settings.



Clicking **Edit Goals** allows you to modify the details of your Goals.



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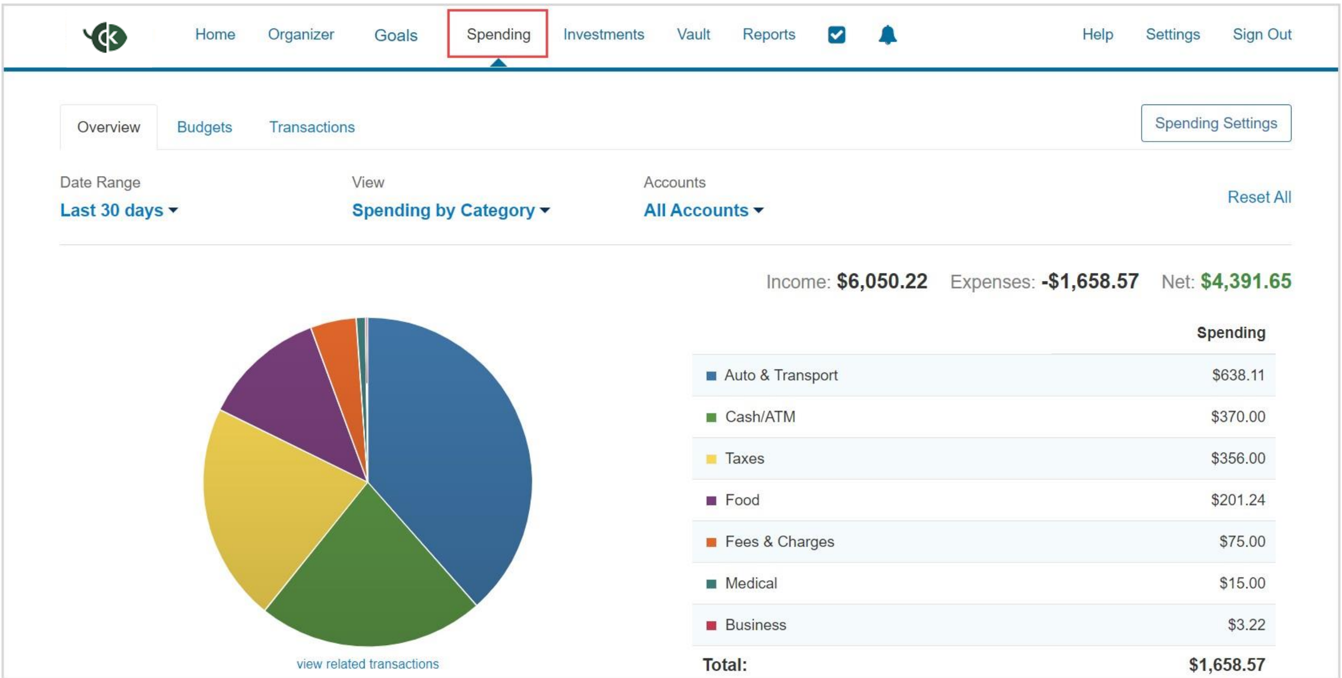
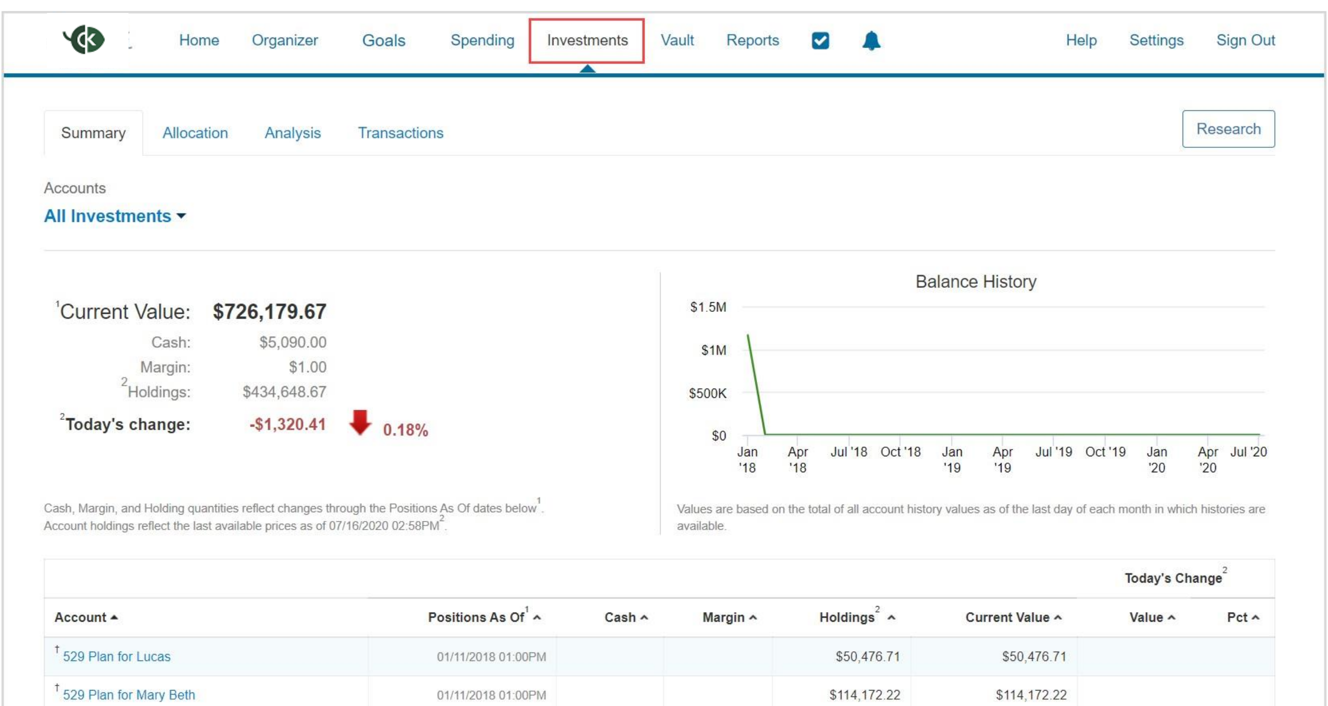
The **Spending** page gives you a clear view of what you're spending each month. This area includes an **Overview**, **Budgets** tab, and **Transactions** tab. Use these three tabs together to create an accurate view of your spending and your current budget. Note that if there is no information on this screen, it is because a bank account or credit card needs to be added to the Accounts section within in your Organizer.



The **Investments** page is made up of four components – Summary, Allocation, Analysis, and Transactions. These will provide you with an overall view of your investments as well as the ability to view individual account activity and asset breakdowns.



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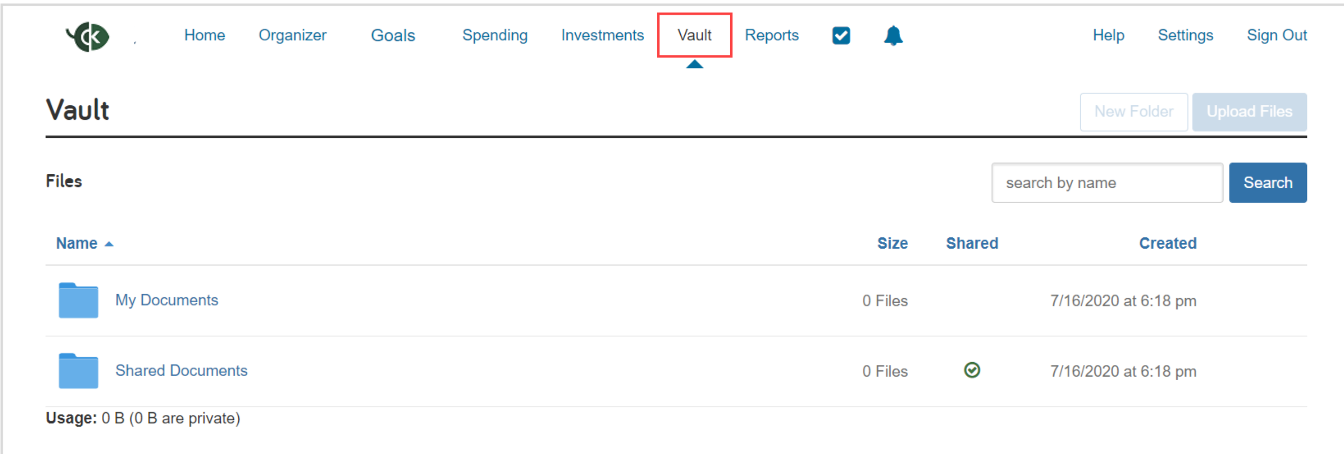
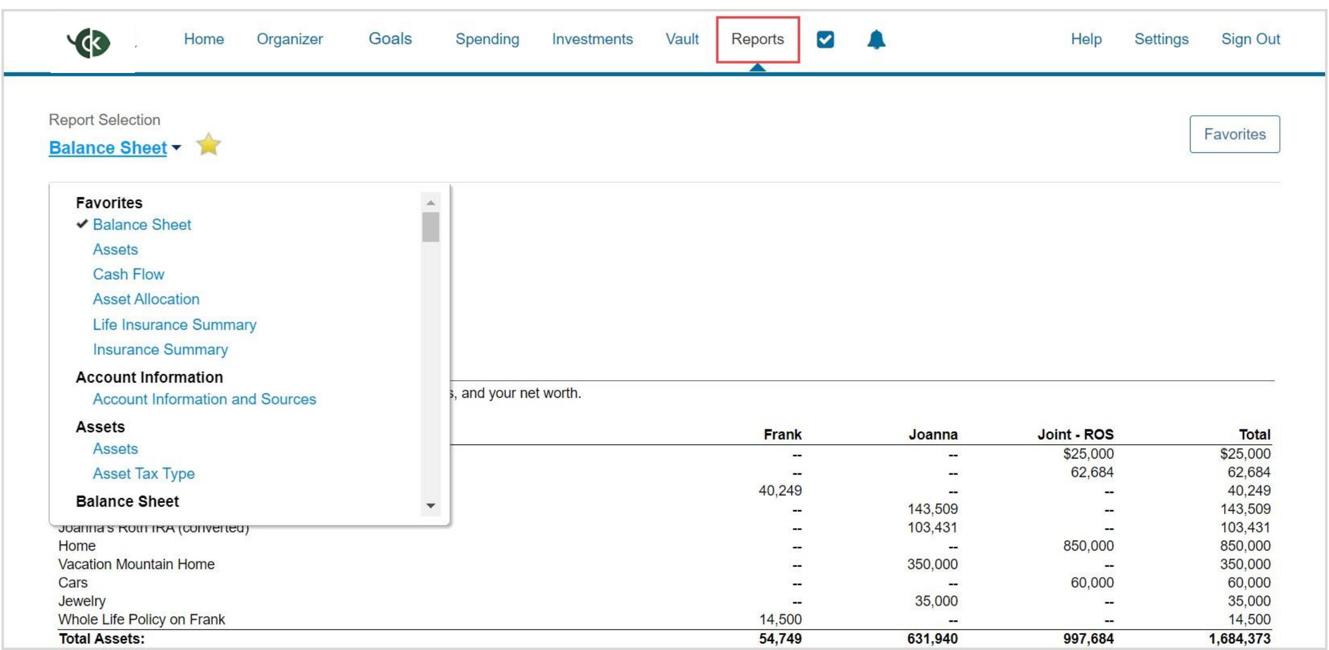
The **Vault** is a secure, searchable repository in which files are stored by Colman Knight for your review, and where you can store files. To upload a file, click either the My Documents or Shared Documents folder, then click **Upload Files**. The My Documents folder is hidden from Colman Knight, however, if you want Colman Knight to see a document, upload into the Shared Documents folder.



The **Reports** tab provides you with a series of reports about your current financial situation.



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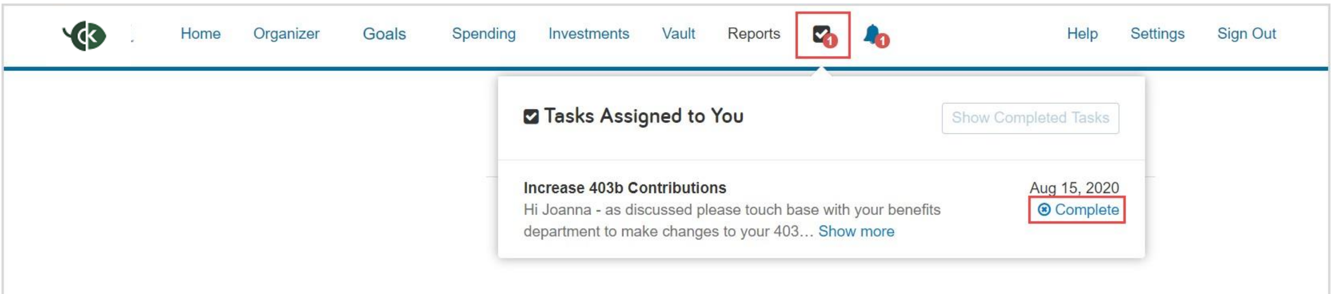
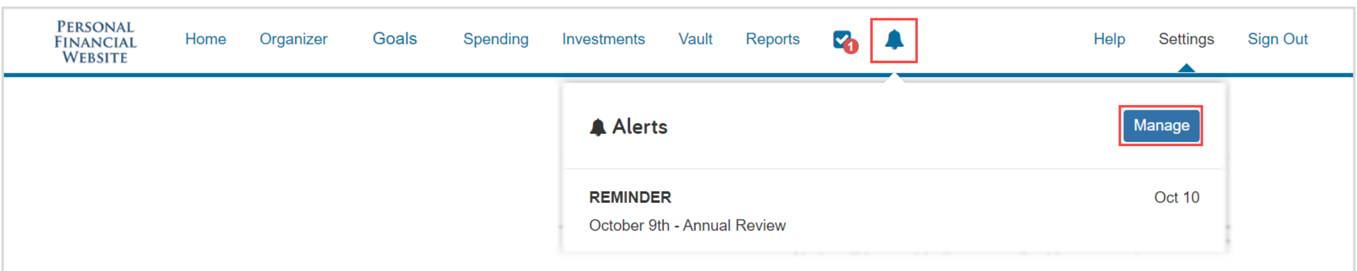
The **Tasks** icon will alert you of any tasks assigned to you by Colman Knight. Click **Complete** when you've finished the task to notify Colman Knight.



The **Alerts** icon allows you to view any triggered alerts. Click **Manage** to set up your Alert parameters.



The **Settings** page is where you can set Alerts, update your Security information, such as passwords and security questions, and set your Privacy Settings which allows you to determine what level of access Colman Knight has when viewing your Spending and Budgeting data.