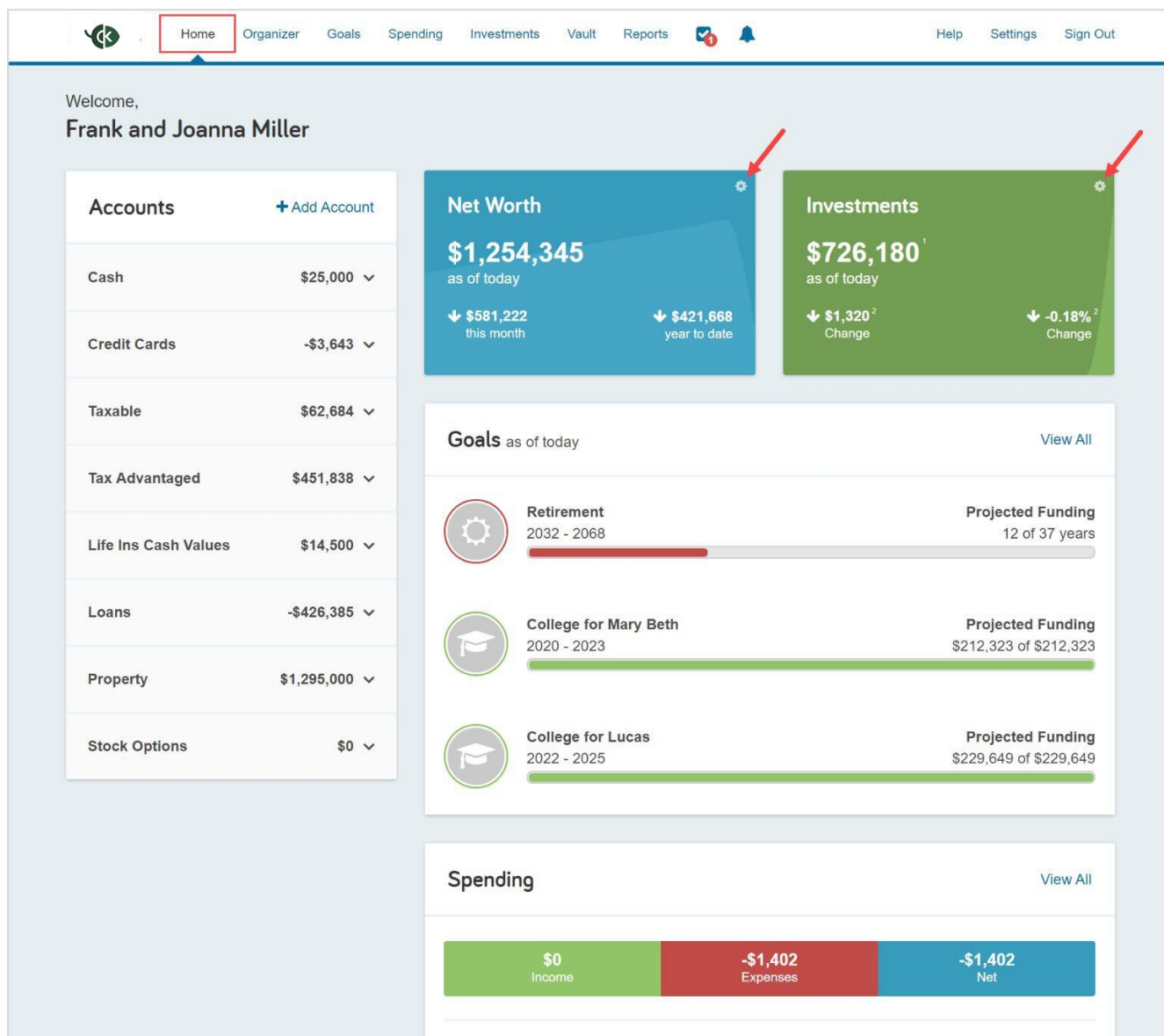


Portal Overview

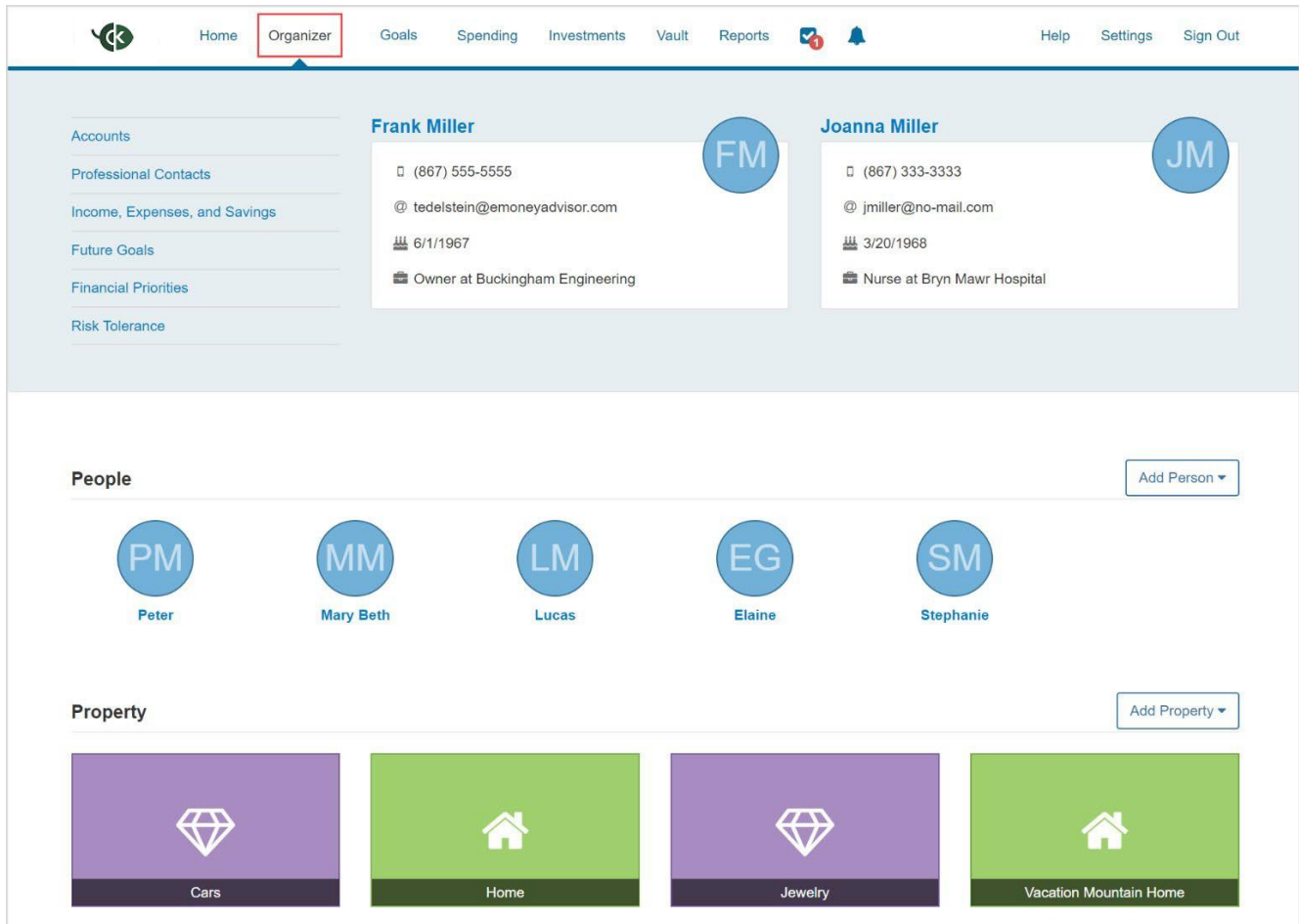
This user guide will provide an overview of the features on your Integral Wealth Portal. Your Portal is designed to give you the tools to organize your financial life and help you stay connected with your finances in one simple consolidated view.

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.

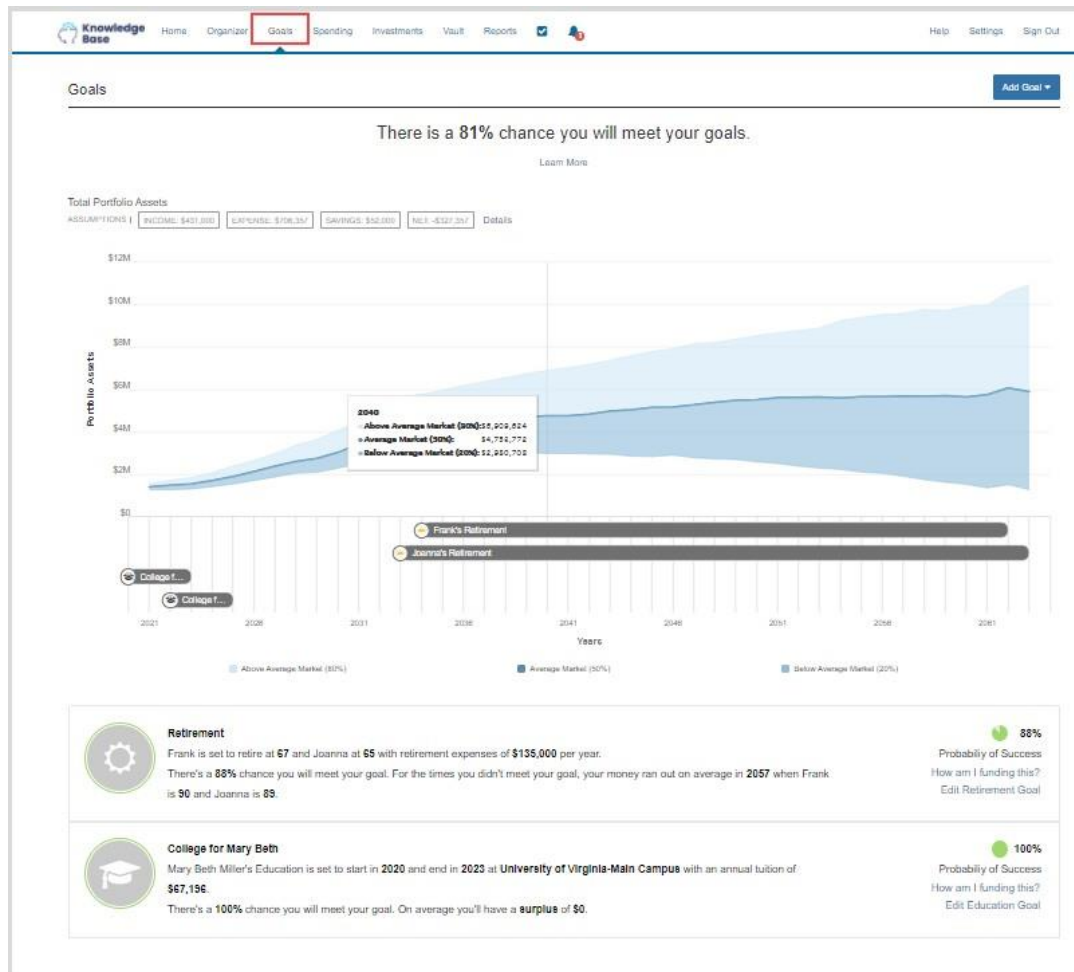


The **Organizer** will help you to consolidate all your important financial information into one place. You can click the **sections** on the left-hand side to add your accounts, financial data, people and property. The information within the Organizer will be used to populate other areas of the website,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

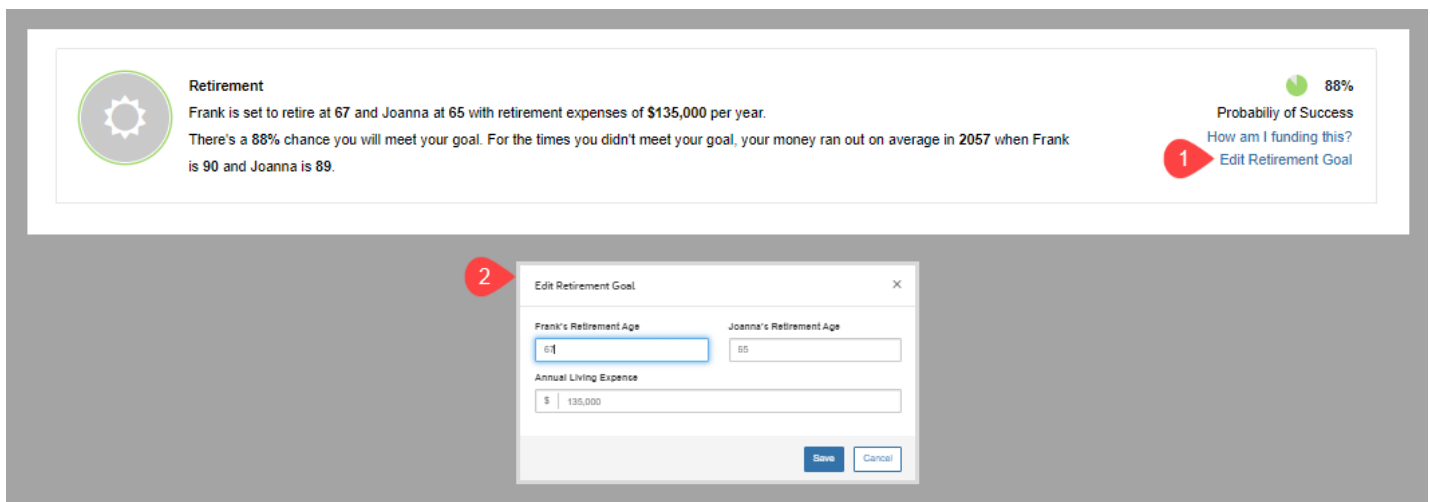


Portal Overview

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.



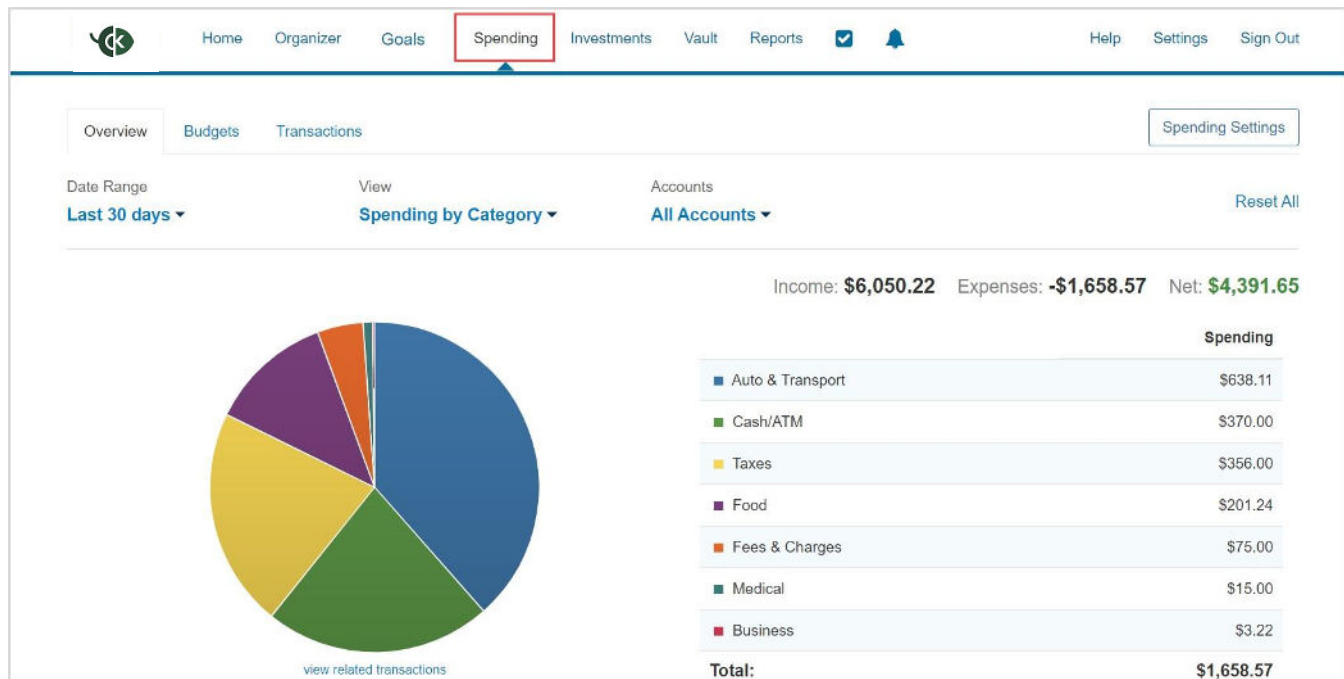
The screenshot shows the 'Edit Retirement Goal' dialog box. It contains the following fields and information:

- Retirement** (Goal Title)
- Frank is set to retire at 67 and Joanna at 65 with retirement expenses of \$135,000 per year.**
- There's a 88% chance you will meet your goal. For the times you didn't meet your goal, your money ran out on average in 2057 when Frank is 90 and Joanna is 89.**
- 88% Probability of Success**
- How am I funding this?**
- Edit Retirement Goal** (Link)
- 1** (Red circle with number 1)
- 2** (Red circle with number 2)
- Edit Retirement Goal** (Dialog Title)
- Frank's Retirement Age** (Input field: 67)
- Joanna's Retirement Age** (Input field: 65)
- Annual Living Expense** (Input field: \$ 135,000)
- Save** (Button)
- Cancel** (Button)

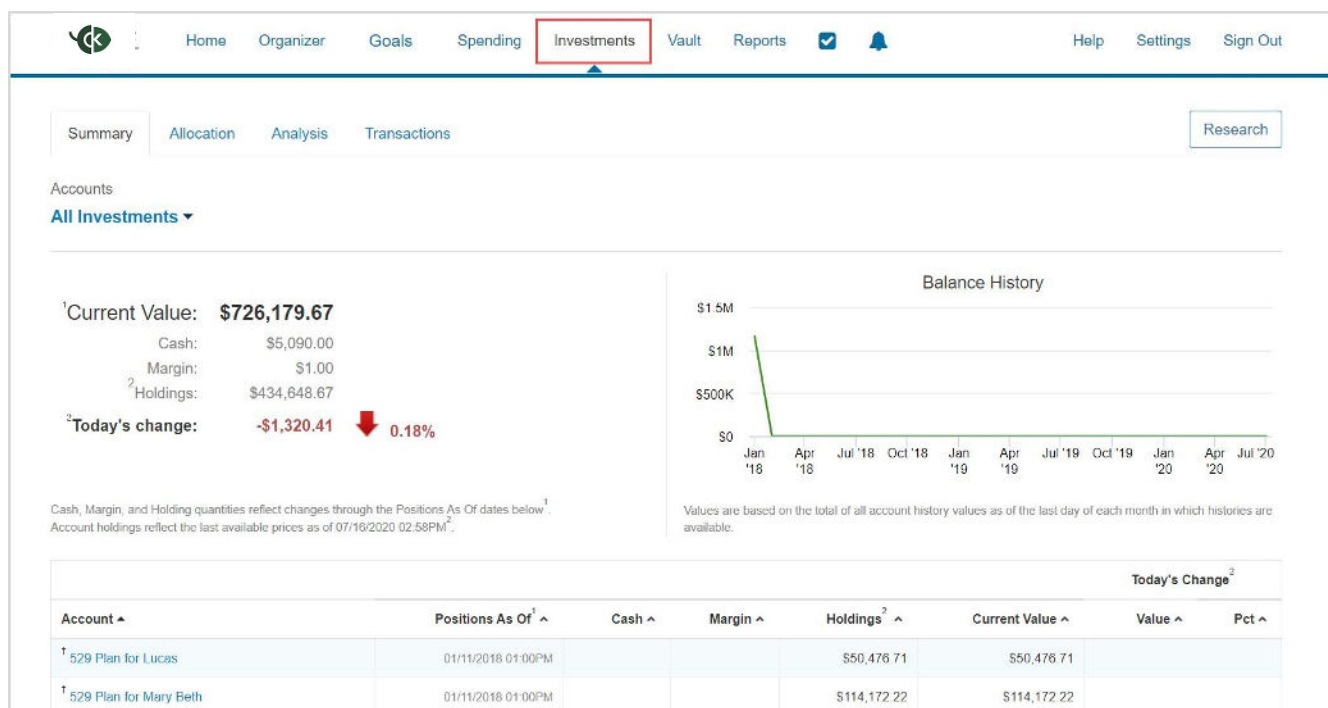


Portal Overview

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.



Portal Overview

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.



HomeOrganizerGoalsSpendingInvestmentsVaultReports

HelpSettingsSign Out

Vault

New FolderUpload Files

Files

search by name

Search

Name

Size

Shared

Created

My Documents

0 Files

7/16/2020 at 6:18 pm


Shared Documents

0 Files

7/16/2020 at 6:18 pm

Usage: 0 B (0 B are private)

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



HomeOrganizerGoalsSpendingInvestmentsVaultReports

HelpSettingsSign Out

Report Selection

Balance Sheet

Favorites

Favorites

Balance Sheet

Assets

Cash Flow

Asset Allocation

Life Insurance Summary

Insurance Summary

Account Information

Account Information and Sources

Assets

Assets

Asset Tax Type

Balance Sheet

Joanna's Retirement (converted)

Home

Vacation Mountain Home

Cars

Jewelry

Whole Life Policy on Frank

Total Assets:

Frank

Joanna

Joint - ROS

Total

--

--

\$25,000

\$25,000

--

--

62,684

62,684

40,249

--

--

40,249

--

143,509

--

143,509

--

103,431

--

103,431

--

--

850,000

850,000

--

350,000

--

350,000

--

--

60,000

60,000

--

35,000

--

35,000

14,500

--

--

14,500

54,749

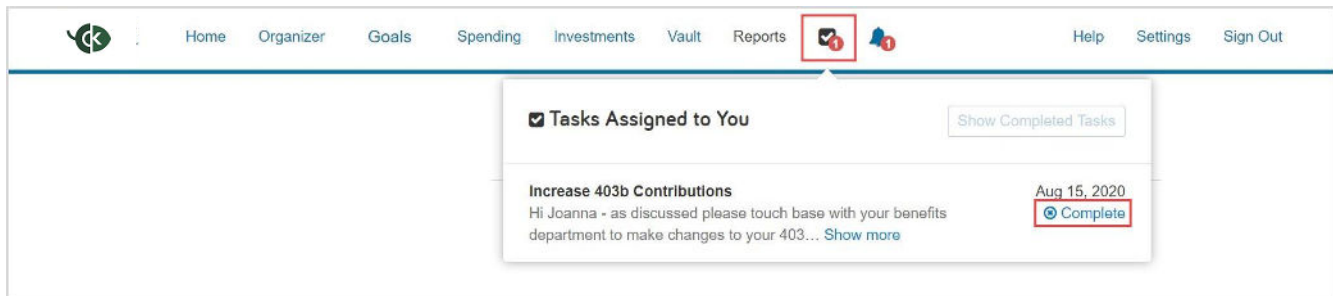
631,940

997,684

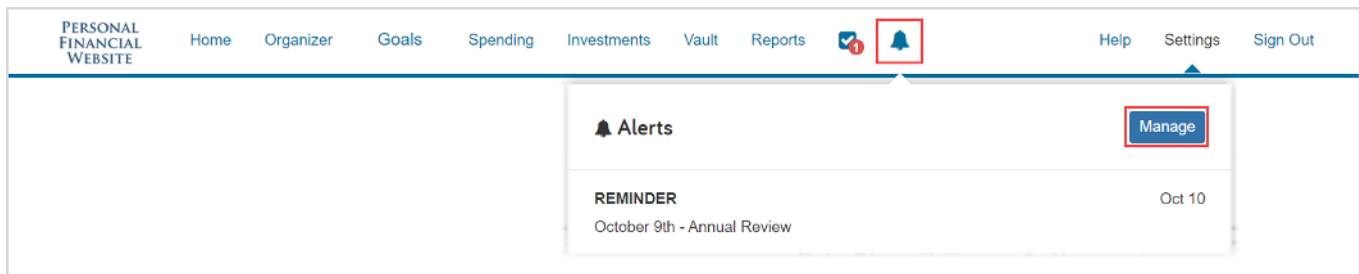
1,684,373

Portal Overview

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.

