



# Weston's Client Portal Overview

Weston has partnered with **Envestnet | Tamarac™**, a leading provider of integrated and web-based portfolio and client management software, to maintain a client portal for Weston Financial clients. The secure portal allows you to review account reports and other documents online at any time, as well as communication tools to interact with your Weston counselor.

**Please note: In order to access the Client Portal, your computer must use Google Chrome or Microsoft Internet Explorer 11 for Internet browsing.**

## Initial Sign-In

To ensure your security, we will provide you with **two separate communications**. You will receive an email with a **link to the sign-in page** of the Client Portal, and a **separate communication** for your **temporary password**. When you log in to the Client Portal for the first time, please use the email address associated with your Weston account(s) and your temporary password. You will be prompted to change your password once you've accessed the Client Portal.

Enter your email address

Enter your temporary password

If you forget your password, click here to request a new temporary password via email

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Sign In

Email:

Password:

Remember me on this computer

Sign In

Did you forget your password? [Recover it here.](#)

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Set Up Challenge Questions

Select and answer three challenge questions. When you sign into your portal from an unrecognized device, you'll be prompted to correctly answer one of these questions.

Challenge questions and answers must meet the following requirements:

- You must select three challenge questions to provide answers for.
- Answers must be the same across the three questions.
- Answers are not case sensitive and may contain up to 64 characters.

Question 1: What is the name of a college you applied to but didn't attend?

Answer 1:

Question 2: Who is a memorable person from your childhood?

Answer 2:

Question 3: What was the first live concert you attended?

Answer 3:

Save

Answer three Challenge Questions for your online security

The first time you sign in to the Client Portal, you will need to answer three **Challenge Questions** for security purposes. If you ever sign in to the Client Portal from an unrecognized device, you will need to answer one of the Challenge Questions to gain access to the Portal. If you opt-in to SMS Messaging (see below), a code will be sent to your mobile phone.

## SMS Set-Up

You may opt-in to sign up for **SMS Messaging through your mobile phone** by providing your mobile phone number, typing in the code sent to your mobile phone, then clicking "Save."

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Set Up Mobile Phone

Short Code Terms of Service

1. When you opt-in to the service we will send you an SMS message to confirm your sign-up.

2. You can cancel the SMS service at any time. Just text "STOP" to 30156. After you send the SMS message "STOP" to us, we will send you an SMS message with instructions on how to cancel. After this, you will no longer receive SMS messages from us. If you want to join again, just sign up as you did the first time and we will start sending SMS messages to you again.

3. If at any time you forget what keywords are supported, just text "HELP" to 30156. After you send the SMS message "HELP" to us, we will respond with instructions on how to use our service and how to unsubscribe.

4. We are able to deliver messages to the following mobile phone carriers: Major carriers AT&T, Verizon Wireless, Sprint, T-Mobile, U.S. Cellular, Alltel, Boost Mobile, Nextel, and Virgin Mobile. Minor carriers Alaska Communications System (ACS), Ameriquest Wireless (AM), Bangor Cellular, Cellular One of East Central IL, Cingular, Cellco Partnership, Pennsylvania, Cincinnati Bell Wireless, Cricket, Coral Wireless, Midco PCS.

I acknowledge that I have read, reviewed, and agree to the Short Code Terms of Service

What phone number should we send verification codes to? We will send a numeric verification code to your phone whenever you sign in from a device that we don't recognize.

Phone number:  Request Code

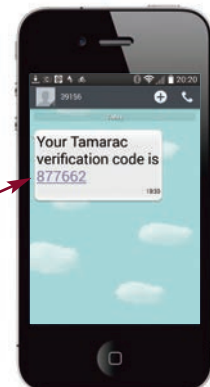
Code:

Save I do not want to set up my phone

Mobile phone number requirements:

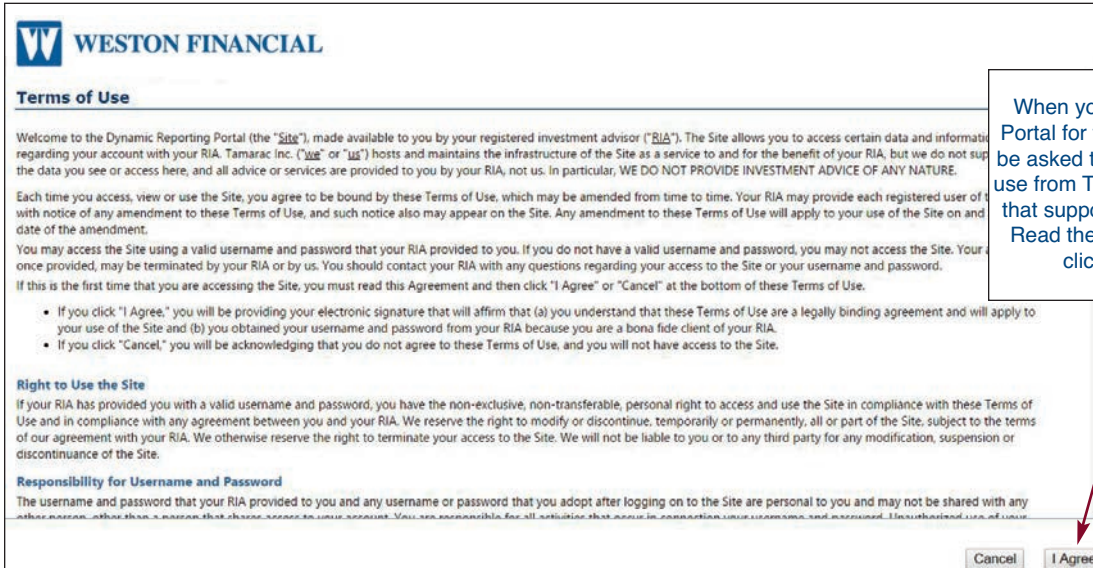
- The mobile phone number must be a U.S. land number.
- and you will be sent a text message with a verification code to complete the process, enter the code and OK Save.
- The verification code is valid for three (3) minutes.

When you opt-in to SMS Messaging, we will send you a text to confirm your sign-up



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# Terms of Use

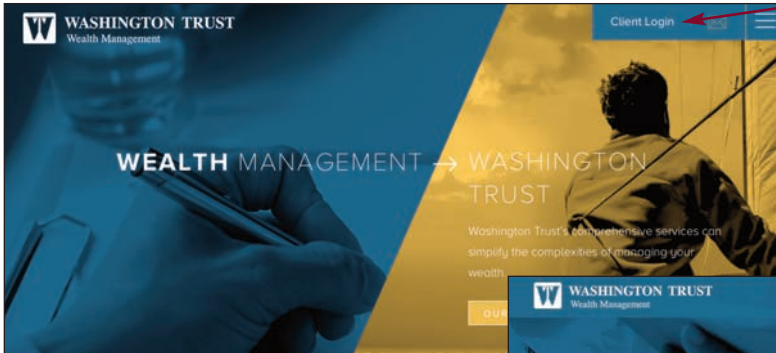


When you access the Client Portal for the first time, you will be asked to accept the terms of use from Tamarac, the company that supports the Client Portal. Read the Terms of Use, then click on "I Agree."

# Website Log-In

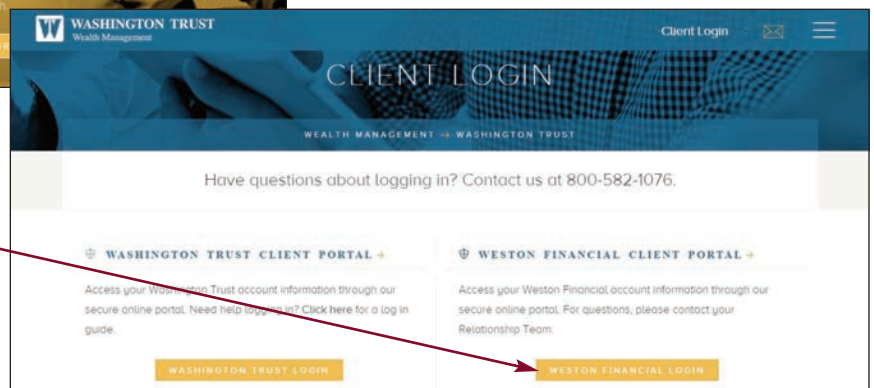
Once you have completed the initial log-in process, you may access the **Client Portal** anytime through our enhanced website at [www.washtrustwealth.com](http://www.washtrustwealth.com) or [www.westonfinancial.net](http://www.westonfinancial.net).

## Home Page



Click here to access the Client Log-In Page

## Client Login Page



Click here to access the Client Portal through our website

# Data



Data will be refreshed daily, typically by 9:30am EST. The as-of date for data will be displayed in the upper right hand corner of the Client Portal. During the "Refresh" process, your Client Portal will be unavailable.

## Dashboard

Your **Dashboard** consists of a **Menu Bar** at the top; a search function for selecting data for one account or in aggregate; three **"Tiles"** with key financial metrics, and **Quick Links** to our most popular **Reports**; and an asset allocation wheel chart and table summary. You can expand the **Managed Market Value** and **Cash Flow Tiles** into detailed reports by clicking on the arrow icon in the upper right of the Tile or you can hide the Tiles by clicking on the "Hide Tiles" link above the right Tile.

The screenshot shows the Weston Financial dashboard interface. Callouts point to the following elements:

- Dashboard button:** Located in the top left corner of the menu bar.
- Click through this Menu Bar to access all views:** Points to the menu bar containing ACCOUNTS, REPORTS, DOCUMENTS, and SERVICE TEAM.
- Account Data to display:** Points to the search bar and account selection dropdown.
- Quick Links:** Points to the 'QUICK LINKS' section on the left side of the dashboard.
- Hide Tiles:** Points to the 'HIDE TILES' link above the rightmost tile.
- Tiles:** Points to the three main data tiles: DAILY CHANGE, MANAGED MARKET VALUE, and CASH FLOW.
- Click on the arrow to show expanded report:** Points to the expand/collapse arrow on the top right of the MANAGED MARKET VALUE tile.

The dashboard displays the following data:

- DAILY CHANGE:** Net TWR: +0.47% (Prior Day)
- MANAGED MARKET VALUE:** 6,515,642
- CASH FLOW:** Cash Inflows: 125,968; Cash Outflows: (487,977) (Year to Date)
- ASSET ALLOCATION:** A donut chart and table showing the distribution of assets across different classes.

Broad Asset Class	Current Value	Current Percent
Domestic Equity	3,420,698.29	52.50%
International Equity	339,685.55	5.21%
Cash	311,405.10	4.78%
Alternative	489,127.83	7.51%
Fixed Income	1,344,049.05	20.63%
Hybrid	610,445.09	9.37%
<b>TOTAL</b>	<b>6,515,410.91</b>	<b>100.00%</b>

## Menu Bar

There are four tabs and a Dashboard Button at the top of the screen:

- **Dashboard Button** - Returns you to your home page
- **Accounts** - Lists your accounts
- **Reports** - Displays all available reports individually
- **Documents** - Allows access to documents posted by your counselor, as well as those documents you post for your counselor
- **Service Team** - Provides contact information for your Weston Team

## Documents

The **Documents tab** enables you to **view documents posted to you by your counselor**. You may also **post documents to your counselor**. For example: your counselor may post a document that requires your signature. You can open the document, sign it, and post it back to the Client Portal for your counselor to view.

Each quarter we will post our **Perspectives & Planning newsletter** on this tab for you to view, download, or print.

The screenshot shows the 'DOCUMENTS' tab selected in the menu bar. A callout points to this tab with the text: "Click here for Documents view".

The 'VAULT' section displays a list of documents with the following details:

File Name	Description
> Perspectives & Planning Newsletter - Fall 2016.pdf	Perspectives & Planning Newsletter - Fall 2016
> Perspectives & Planning Newsletter - Summer 2016.pdf	Perspectives & Planning Newsletter - Summer 2016
> Perspectives & Planning Newsletter - Spring 2016.pdf	Perspectives & Planning Newsletter - Spring 2016
> Perspectives & Planning Newsletter - Winter 2016.pdf	Perspectives & Planning Newsletter - Winter 2016
> Weston Privacy Notice.pdf	Weston Privacy Notice

## Quick Links to Reports

Navigate to detailed **Reports** via the Reports tab on the Menu Bar or click on the Quick Links in the middle of the **Dashboard**. Below are examples of the **Comparative Review** and **Realized Gains/Losses** reports. You can export the data from all **Reports** to an Excel spreadsheet using the link at the top right of the Report. The **Market Charts** allows you to input a security symbol and obtain performance information for the security sources from **Google Finance**. Clicking on security symbols within Reports also takes you to Google Finance information.

### Comparative Review

WESTON FINANCIAL ACCOUNTS REPORTS DOCUMENTS SERVICE TEAM DEMO ACCOUNT 1 Data as of 11/2/16

FIND DATA FOR Demo Account (DemoAccount01) Search accounts CHANGE HIDE TILES ^

DAILY CHANGE Net TWR **↓0.61%** Prior Day

MANAGED MARKET VALUE **6,472,458**

CASH FLOW Cash Inflows 125,968 Cash Outflows (491,243) Year to Date

ASSET ALLOCATION CURRENT HOLDINGS **COMPARATIVE REVIEW - YTD** CAPITAL FLOWS REALIZED GAINS/LOSSES YTD MARKET CHARTS

COMPARATIVE REVIEW - YTD for Demo Account (DemoAccount01)

Account	Account Type	12/31/15 Value	Net Contribution	Net Investment Gain	11/2/16 Value
Demo Account (DemoAccount01-A, Columbia Large Cap Growth)	REG	998,694	13	(80,020)	918,687
Demo Account (DemoAccount01-B, Morgan Stanley Fixed Income)	REG	1,938,314	(795,443)	31,981	1,174,851
Demo Account (DemoAccount01-C, Masstrapasqua Large Cap Core)	REG	792,128	0	28,657	820,785

**EXPORT DATA**

Quick Links

Easily download your account information into an Excel spreadsheet

### Realized Gains/Losses

WESTON FINANCIAL ACCOUNTS REPORTS DOCUMENTS SERVICE TEAM DEMO ACCOUNT 1 Data as of 11/2/16

FIND DATA FOR Demo Account (DemoAccount01) Search accounts CHANGE HIDE TILES ^

DAILY CHANGE Net TWR **↓0.61%** Prior Day

MANAGED MARKET VALUE **6,472,458**

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ASSET ALLOCATION CURRENT HOLDINGS COMPARATIVE REVIEW - YTD **REALIZED GAINS/LOSSES YTD** MARKET CHARTS

REALIZED GAINS/LOSSES YTD for Demo Account (DemoAccount01)

REALIZED GAINS/LOSSES CAPITAL GAIN DISTRIBUTIONS

1-100 of 148 transactions Go to page: 1

Date	Open Date	Account	Description	Quantity	Net Proceeds	Cost Basis	Short Term Gain/Loss	Long Term Gain/Loss	Total Gain/Loss
11/02/2016	02/09/2011	Demo Account (DemoAccount01-D, JP Morgan Mid Cap Value)	Amerisourcebergen Corp (ABC)	22.50	1,710.75	1,180.00		530.75	530.75
11/01/2016	05/22/2013	Demo Account (DemoAccount01-B, Morgan Stanley Fixed Income)	Connecticut St Ser D (20772GTQ1) 11/01/2023 5.000% Pre-Refunded 11/01/2016 100.00	62,500.00	62,500.00	70,898.75			(8,398.75)

**EXPORT DATA**

Quick Links

Easily download your account information into an Excel spreadsheet

For more information, contact Weston Financial at 781-235-7055.