



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, you should use one of the following supported browsers:

- For Windows: Internet Explorer 11, Edge, Chrome, or Firefox
- For Mac: Safari 9.1.2 or later

Initial Sign-In

The first sign-in to your Client Portal is a **simple three-step process.**

1. Click on "Set New Password" link in initial email.
2. Establish and confirm new password.
3. Sign in to your Client Portal using the email address associated with your Weston account(s) and your newly created password.

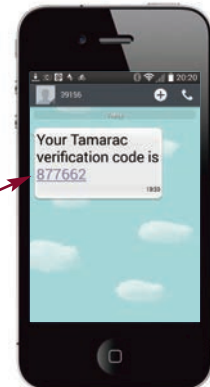
Answer three Challenge Questions for your online security

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."

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



cont'd on Page 2

Terms of Use

WESTON FINANCIAL

Terms of Use

Welcome to the Dynamic Reporting Portal (the "Site"), made available to you by your registered investment advisor ("RIA"). The Site allows you to access certain data and information regarding your account with your RIA. Tamarac Inc. ("TAMARAC" or "US") hosts and maintains the infrastructure of the Site as a service to and for the benefit of your RIA, but we do not supply the data you see or access here, and all advice or services are provided to you by your RIA, not us. In particular, WE DO NOT PROVIDE INVESTMENT ADVICE OF ANY NATURE.

Each time you access, view or use the Site, you agree to be bound by these Terms of Use, which may be amended from time to time. Your RIA may provide each registered user of the Site with notice of any amendment to these Terms of Use, and such notice also may appear on the Site. Any amendment to these Terms of Use will apply to your use of the Site on and after the date of the amendment.

You may access the Site using a valid username and password that your RIA provided to you. If you do not have a valid username and password, you may not access the Site. Your access to the Site, once provided, may be terminated by your RIA or by us. You should contact your RIA with any questions regarding your access to the Site or your username and password.

If this is the first time that you are accessing the Site, you must read this Agreement and then click "I Agree" or "Cancel" at the bottom of these Terms of Use.

- If you click "I Agree," you will be providing your electronic signature that will affirm that (a) you understand that these Terms of Use are a legally binding agreement and will apply to your use of the Site and (b) you obtained your username and password from your RIA because you are a bona fide client of your RIA.
- If you click "Cancel," you will be acknowledging that you do not agree to these Terms of Use, and you will not have access to the Site.

Right to Use the Site

If your RIA has provided you with a valid username and password, you have the non-exclusive, non-transferable, personal right to access and use the Site in compliance with these Terms of Use and in compliance with any agreement between you and your RIA. We reserve the right to modify or discontinue, temporarily or permanently, all or part of the Site, subject to the terms of our agreement with your RIA. We otherwise reserve the right to terminate your access to the Site. We will not be liable to you or to any third party for any modification, suspension or discontinuance of the Site.

Responsibility for Username and Password

The username and password that your RIA provided to you and any username or password that you adopt after logging on to the Site are personal to you and may not be shared with any other person, other than a person that shares access to your account. You are responsible for all activities that occur in connection with your username and password. Use of the Site is subject to the Terms of Use of the Site.

Cancel I Agree

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 or www.westonfinancial.net.

Home Page

WASHINGTON TRUST
Wealth Management

WEALTH MANAGEMENT → WASHINGTON TRUST

Washington Trust's comprehensive services can simplify the complexities of managing your wealth.

Client Login

Click here to access the Client Log-In Page

Client Login Page

WASHINGTON TRUST
Wealth Management

Client Login

WEALTH MANAGEMENT → WASHINGTON TRUST

CLIENT LOGIN

Have questions about logging in? Contact us at 800-582-1076.

WASHINGTON TRUST CLIENT PORTAL

Access your Washington Trust account information through our secure online portal. Need help logging in? Click here for a log in guide.

WASHINGTON TRUST LOGIN

WESTON FINANCIAL CLIENT PORTAL

Access your Weston Financial account information through our secure online portal. For questions, please contact your Relationship Team.

WESTON FINANCIAL LOGIN

Click here to access the Client Portal through our website

Data

DEMO ACCOUNT 1
Data as of 10/28/16

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 field 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%
TOTAL	6,515,410.91	100.00%

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 the 'DOCUMENTS' tab with the text: "Click here for Documents view".

The 'VAULT' section shows 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

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

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.