Weston’s New Client Portal

Overview

Weston has selected Envestnet | Tamarac™, a leading provider of integrated and web-based portfolio and client management software, to develop 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 initiate receiving a new temporary password via email

After signing on to the Client Portal for the first time, you’ll be asked to choose and answer three Challenge Questions. In the future, if you sign into your portal from an unrecognized device, you’ll be prompted to correctly answer one of these questions, unless you opt-in to SMS Messaging, which will send a code to your mobile phone (see below for SMS Set-up).

SMS Set-Up

You may opt 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

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Terms of Use

Dynamic Reporting Portal

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. ("we" 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 any of 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, 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.

Website Log-In

Once you have completed the initial log-in process, you may access the Client Portal anytime though our enhanced website at www.washtrustwealth.com or www.westonfinancial.net.

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.
Menu Bar

There are four tabs at the top of the Menu Bar:

- **Dashboard** - Returns you to your home page
- **Accounts** - Lists your accounts
- **Reports** - Displays available reports individually
- **Documents** - Access to all documents posted to you from your counselor, as well as those you have posted to your counselor

The **Dashboard** is your home page view of the information shared with you by your counselor. You can see an account list, view reports that display your account information as of the last Market close, view documents from your counselor, and post documents.

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. You will receive email alerts anytime a new document is posted to the Client Portal.
Dashboard

The layout of your Dashboard reports can be customized to suit your liking. The functions outlined below will help you arrange, minimize, remove, or add additional reports.

To add a report to your Dashboard:
1. Click “Add Report”
2. Choose the report you want to display, then click “Add”

TIP: Reports on your Dashboard can be reorganized simply by clicking and dragging them.