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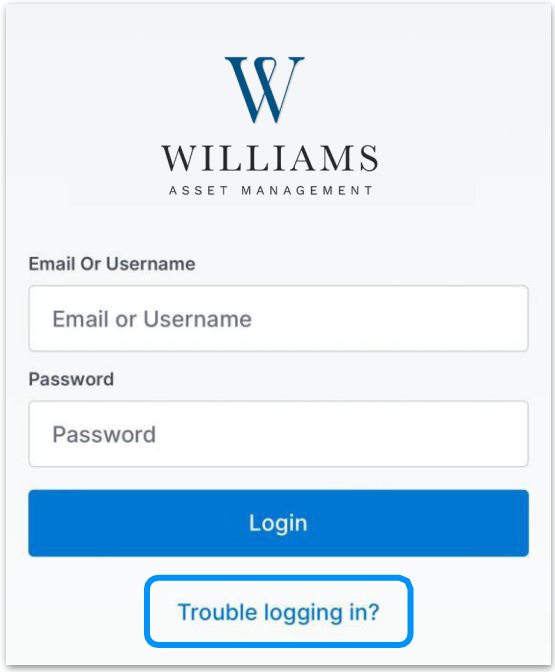
ASSET MANAGEMENT

Welcome to your WAM Connect mobile financial portal! The mobile app includes your account summaries, financial plans, allocations, documents, and advisor communication in one consolidated experience. This experience empowers you to understand your whole financial picture wherever you are and stay connected on the go.

This guide walks through the features in the mobile app and provides tips on how to get the most out of the experience.

Accessing Your Account

Download the mobile app from the Apple or Android app store, searching the app name that your advisor provided you. Once complete, the mobile app will be accessible on your mobile device.

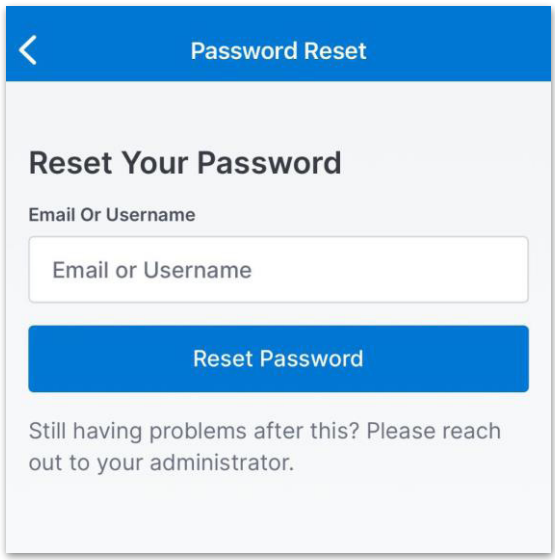


To login, enter your username > enter your password > click Login. These are the same credentials you use when logging in on a desktop or browser.

TwoFactor Authentication (2FA) is mandatory when logging into the client portal. Review the **Two/Multi-Factor Authentication Overview** for more information and additional instructions.

Reset Your Password

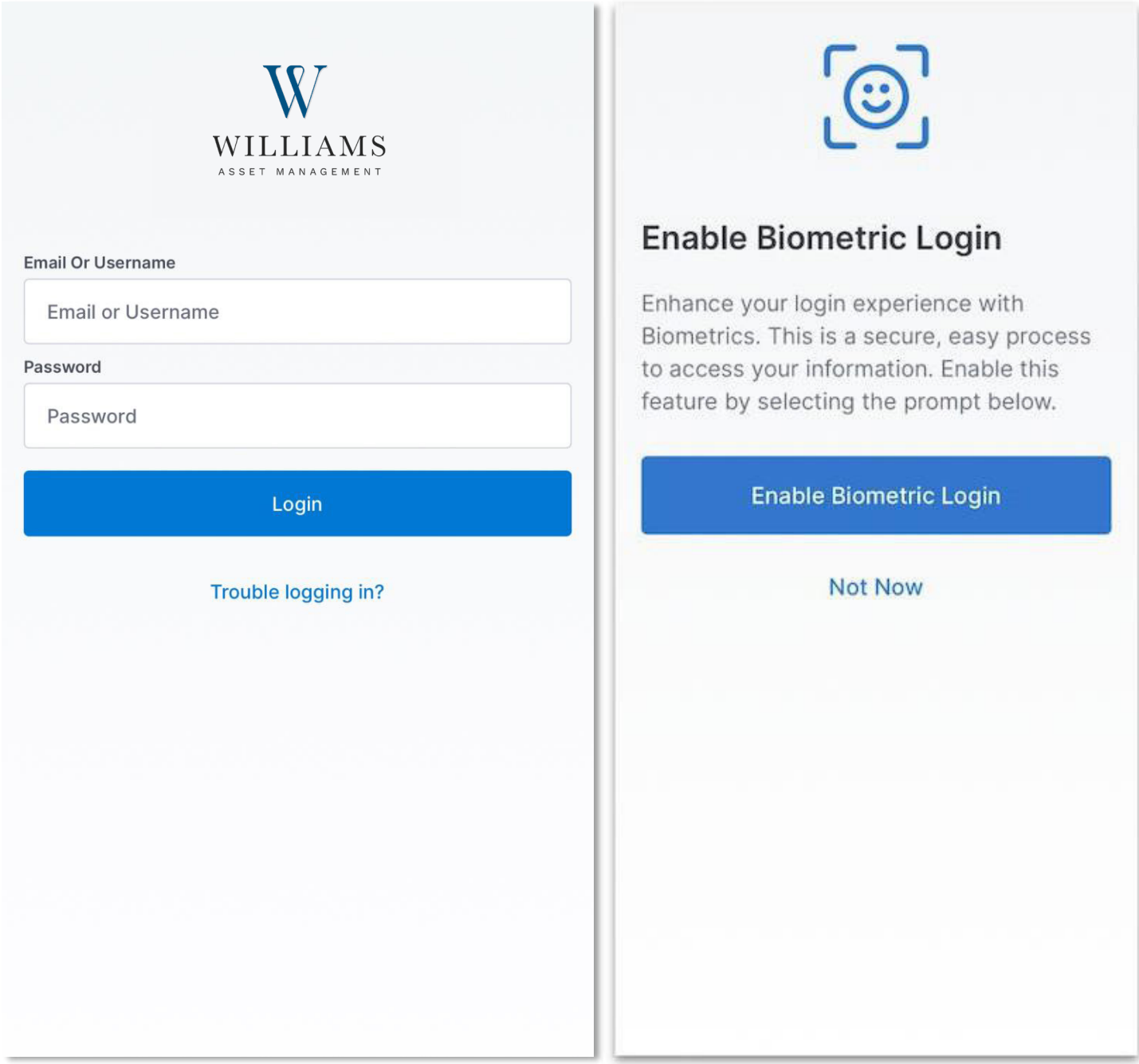
On the login page, select **Trouble logging in?** to reset your password. On the next prompt, enter your user-name and click **Reset Password**. An email is sent to the email address that is associated with your household.



Then, follow the instructions in the email to reset your password and access the mobile app. When creating a new password, ensure that your password meets the following criteria:

- An uppercase and lowercase letter
- A number or special character
- 10 or more characters
- Does not contain a year; for example: 1970, 2023, etc.

Enable Biometrics on the initial login screen within the app. Click Login with Biometrics and then follow the prompts to enable Face ID. After the initial login, you will not be prompted each time. To allow use while in the app, navigate to the Menu tab and under Settings, toggle on “Use Biometrics”.



When selecting "Log out" on the Menu intraapp, users return to the original login screen.
To logout via biometrics, simply close the app in your app tray.

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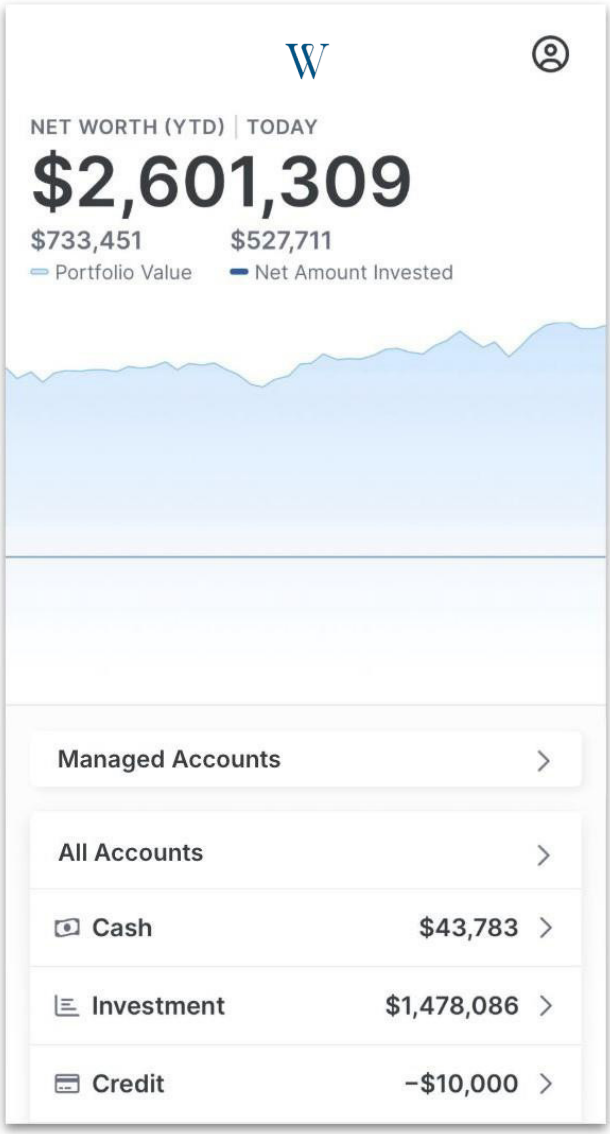
Please Note: There is a personalized "Loading Your Data" loading state prior to arriving on the landing page.

Overview Tab
The landing page for the mobile app displays an interactive graph of the Portfolio Value versus Net Amount Invested.

Slide your finger across the graph to view data for a specific date.

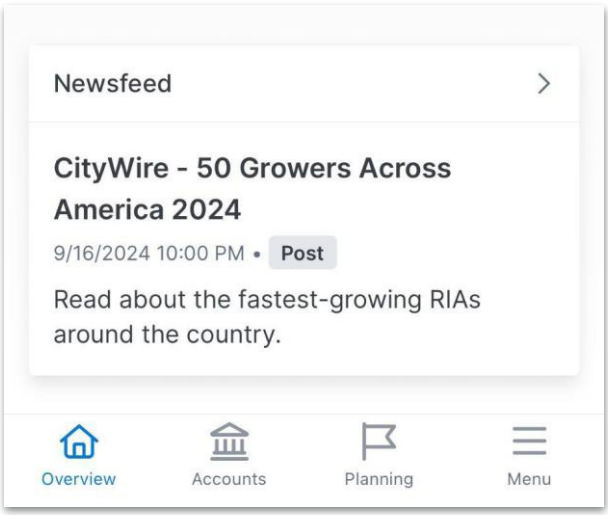


Accounts Summary
Review Managed Accounts and Unmanaged Accounts for each portfolio category including Cash, Investment, Credit, Net Worth, and more.

Select any of the subcategories to expand and open on the Accounts Tab for more information.

Newsfeed Posts
Stay connected wherever you are. Review posts and updates from your advisor, download and review portfolio statements, and more. Simply tap a newsfeed post to view.

If you do not see the Newsfeed section, your advisor may not utilize this functionality. Talk to your advisor for more information.



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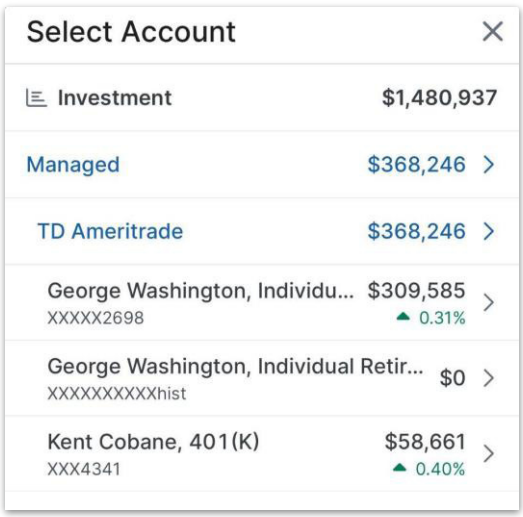
Accounts Tab

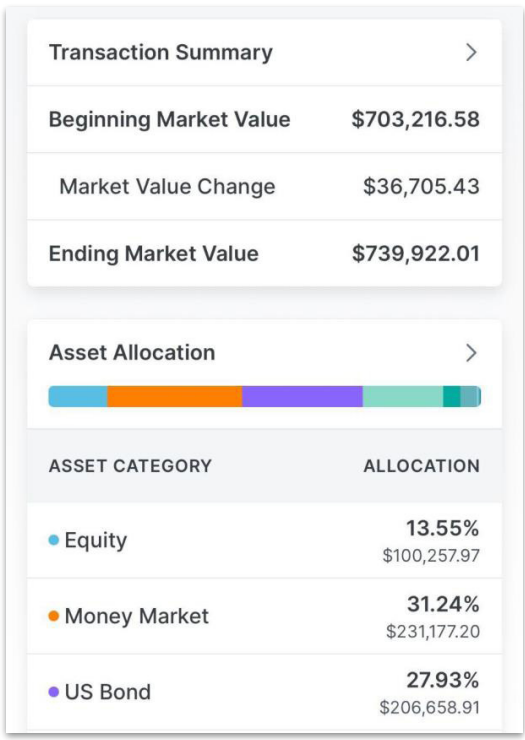
Review your portfolio in greater detail using the Accounts Tab. Expand the portfolio categories to see the accounts inside; select any Managed or Unmanaged Account to view its portfolio summary, asset allocation, performance, and activity summary. If access is provided, tap the + from the main accounts screen to add manual accounts.



TIP:
To change the date range of the graph, click the calendar icon at the top right.

TIP:
Use the drop down menu at the top of your screen to switch between accounts.





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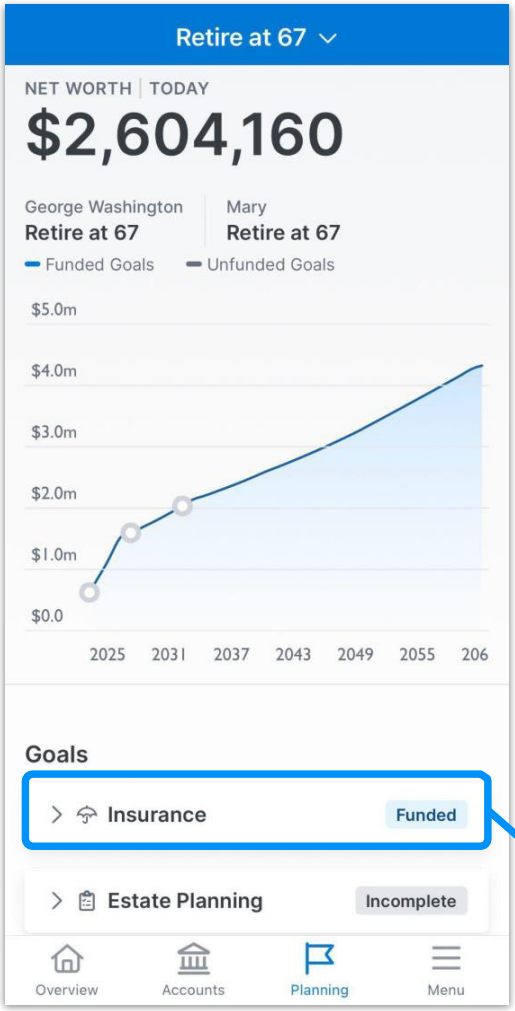
Planning Tab

Use the Planning Tab to review your financial goals, retirement age and income plan, net worth, Monte Carlo probability of success, and assumptions.

Goals

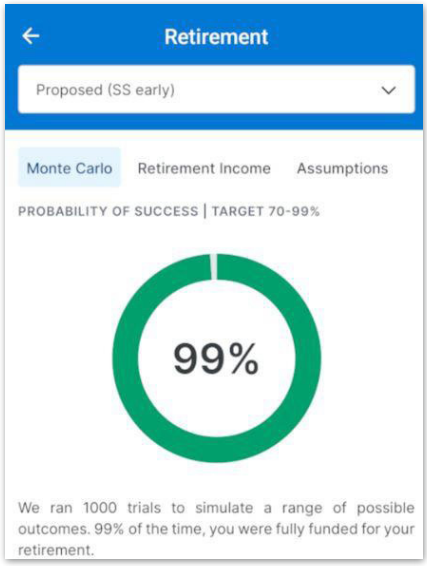
Select any goal to view additional details specific to that category. These include whether the goal is funded or completed, how much progress has been made towards reaching that goal, and more.

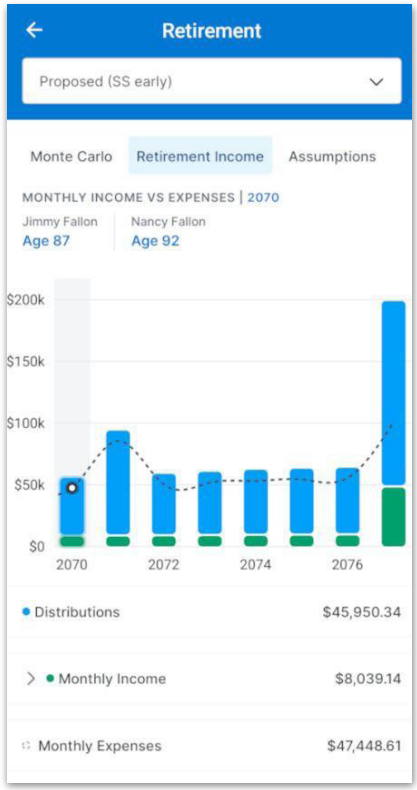
TIP: Click the drop down menu at the top of the page to view additional plans.



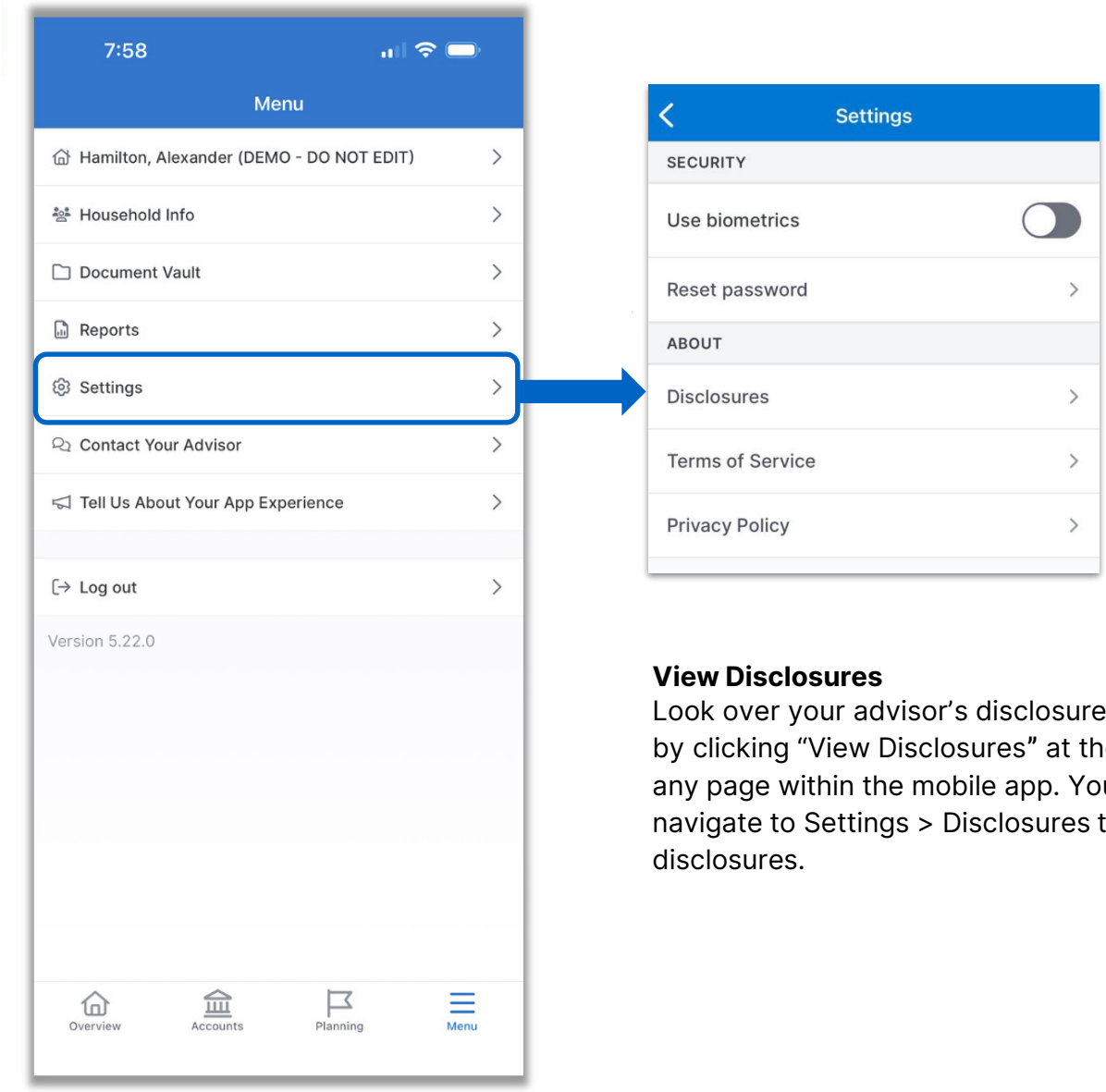
Monte Carlo & Retirement Income

To view your Monte Carlo and Retirement Income, go to the Planning Tab > Scroll to Retirement > Open the Retirement tile and View Details.









View Disclosures
Look over your advisor's disclosures at any time by clicking "View Disclosures" at the bottom of any page within the mobile app. You can also navigate to Settings > Disclosures to view the disclosures.

Menu Tab
Set app preferences, update personal information, access files and disclosures, and submit feedback.

- Toggle between linked households
- Upload, view and download files stored in the Document Vault
- Enable biometrics (face recognition/touch ID) or reset your password
- Tell us your experience with the app and submit feedback

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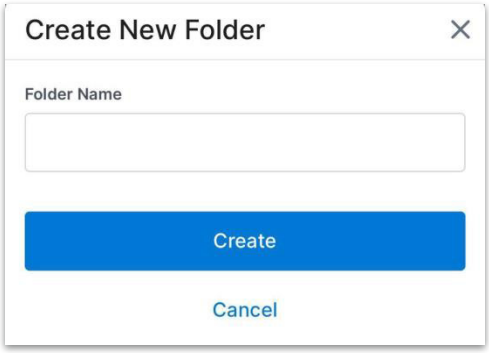
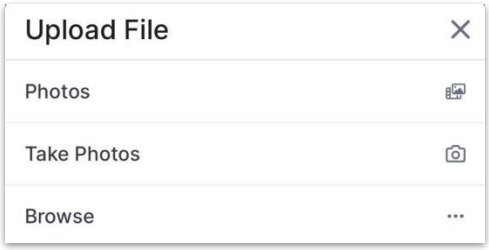
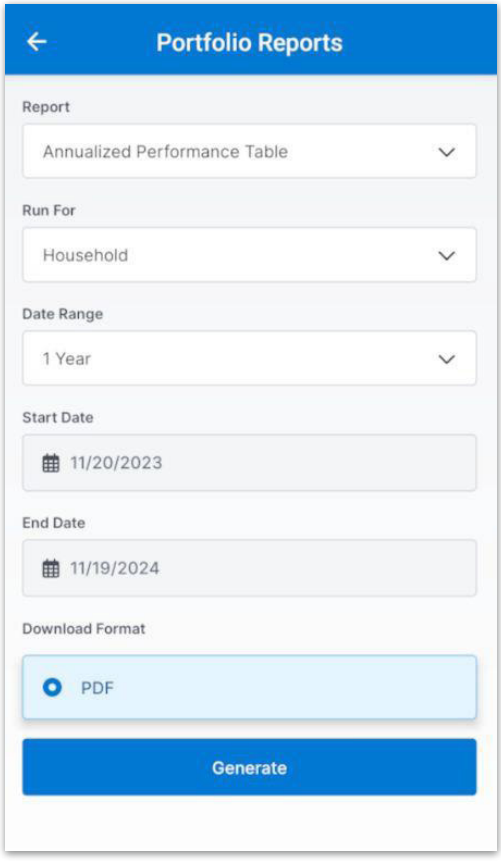
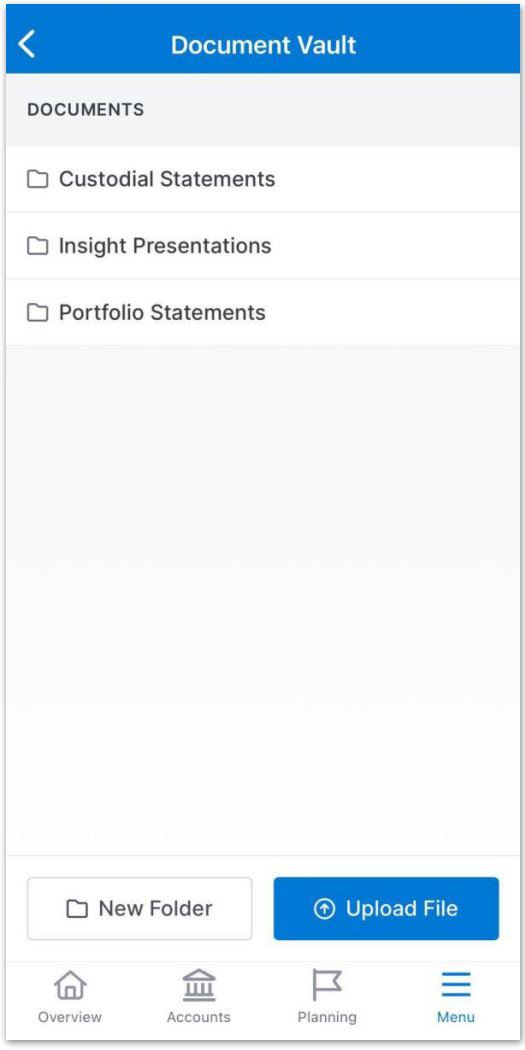
Document Vault

View and download statements, create new folders, and upload files directly from your phone!









Reports

Run Portfolio Reports and download them to your phone. Choose the report, select the "run for" and date range, and click generate.

These reports are only available with the latest version of WAM Connect reporting.

If you do not see this option, please reach out to your advisor for additional information.

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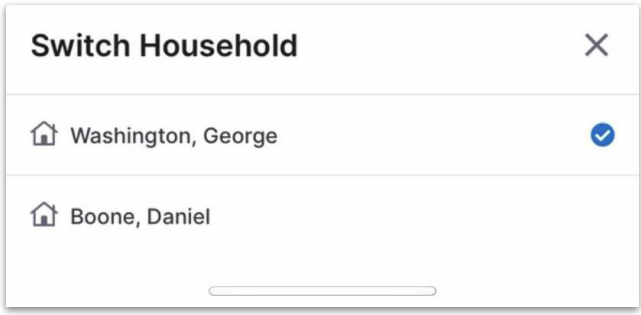
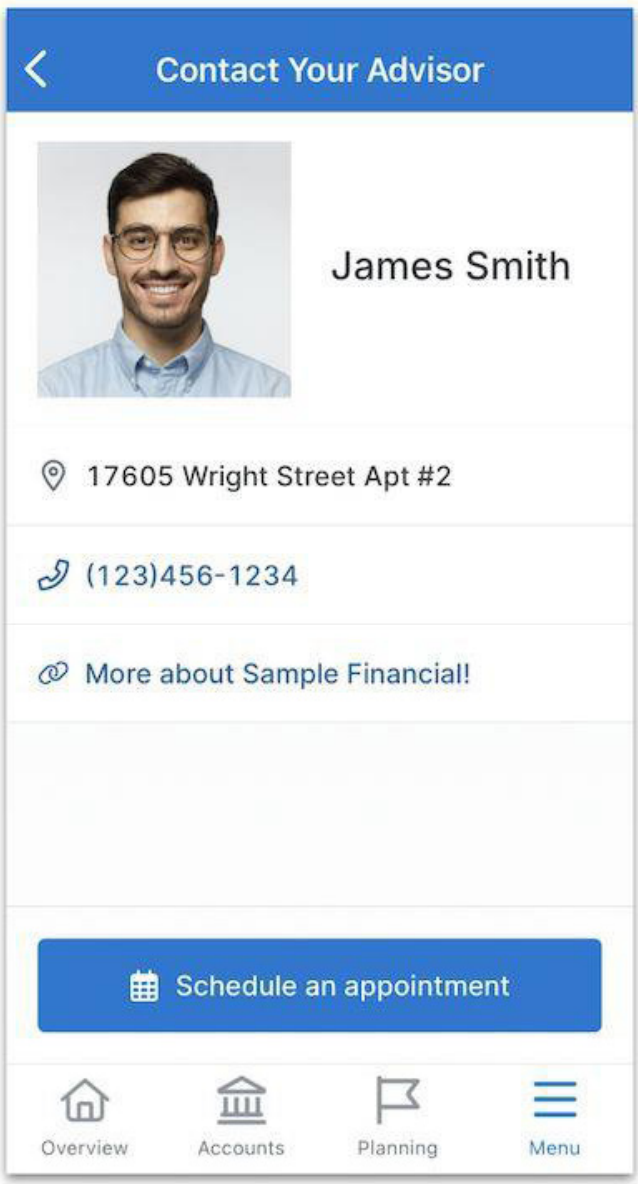
Toggle Between Related Households
Select the row with the household icon to toggle between linked households, if applicable. The Switch Household menu will appear from the bottom of your screen, allowing you to switch profiles seamlessly.

For example, if your personal accounts and business accounts live in separate households, use this feature to switch between which set of accounts you're viewing.



Contact Your Advisor
View your advisor's contact information and quickly schedule a meeting by utilizing the Schedule an appointment button.



Submit Feedback
Please note the feedback submitted is not an alternative to corresponding with your advisor. Do not provide any personal information when submitting feedback.

