



Enriching people's lives through financial guidance

Client Portal Overview

Username = email: _____ Password: _____ *we recommend changing your password

To log on, visit our website at www.twpteam.com/portal

Menu Items:

- **Portfolio** – holding, performance and activity information on managed accounts.
- **Documents** – previous investment reports + secure file vault
- **Tools** – See a family balance sheet and status of Required Minimum Distributions (if applicable)
- **Updates** – investment commentary (to be utilized in future)

Portfolio

1. Click on specific account on left bar, or the green “ALL Accounts” to filter information by account.
2. Change the “as of date” or date range to view your accounts. A drop down box provides easy access to common date ranges: YTD, 1 & 3 year, & inception.
1. Group by Category, class or account. Then use the black carrot to expand account, category or class to see more holding details.
2. Powerful activity overview that shows transaction data since inception for:
 - Contributions & distributions
 - Dividends
 - Buys & Sells (aka trading activity)
 - Internal account movement (i.e. making an IRA contribution from an existing investment account)

Documents

1. Run “ad hoc” reports for your managed investments
2. Store and view your recent (or historical) investment statements we’ve prepared for you.
3. Utilize a secure client file vault

Tools

1. Balance Sheet gives you the ability to enter other assets (i.e. house, car, checking) or liabilities (i.e. mortgage) to see your overall net worth
2. RMD – for clients subject to Required Minimum Distributions (“RMD”), this screen will provide up to date status of RMD requirements and distributions yet to be satisfied by the end of the year.

Updates

1. View relevant investment communications (articles, videos, blogs) we post or share. We would like to know what types and how much communication you are interested in seeing.

On the upper right **profile dropdown menu**, you can change your password, address or telephone numbers. You can also setup additional two-factor security and enable updates via text message.

1. We recommend that you change your password and enable 2-factor login authentication immediately. 2-factor is a means to prevent unwanted logins and will use a cellphone or email address to prove your identity anytime you login from a new computer or IP address.
2. “Notifications” allow you to subscribe to portfolio balance and performance updates via SMS TEXT message or email daily, weekly or monthly
3. You can also download our [app from the Apple Store](#) or [Android market place](#) to access the same information on your mobile device.