As of April 2016, our clients have access to a new WJ client portal. Following is a walkthrough of how to navigate your portal.

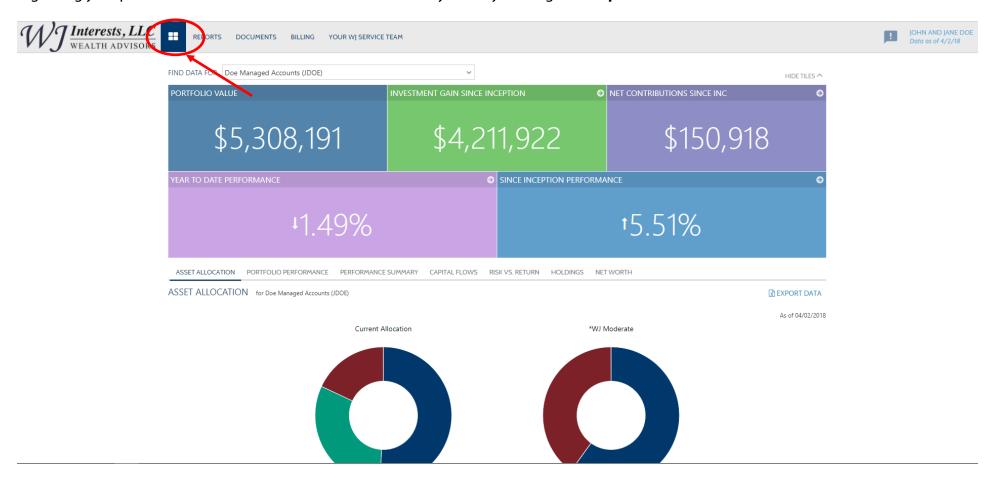
To access your portal for the first time, an email similar to the one below will be sent to you, prompting you to sign in. Click the link in the email and you will be taken to a login screen:



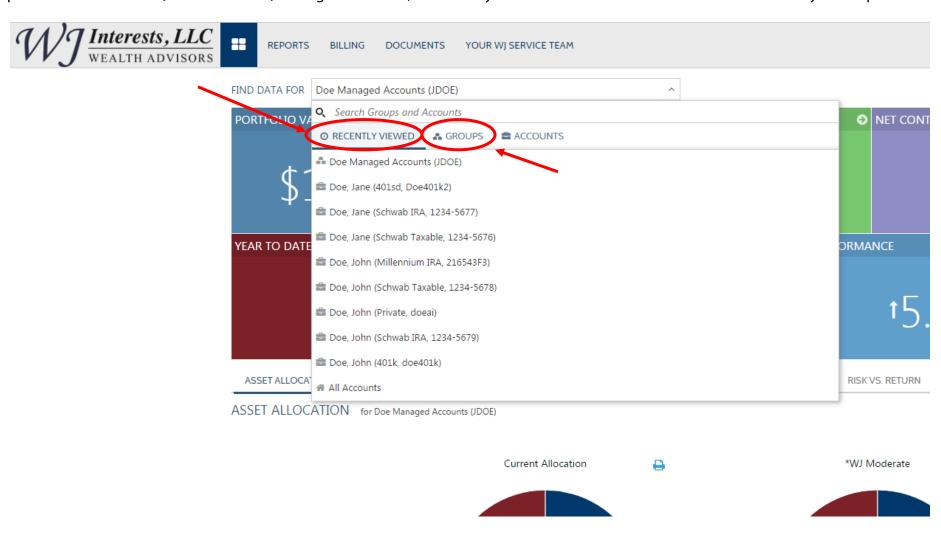
Type in your email address and the temporary password found in the email, and click Sign In. To reach this page again, add this login page to your Favorites on your internet browser, or return to through the <u>WJ Interests website</u> or with the URL https://wjinterests.portal.tamaracinc.com:



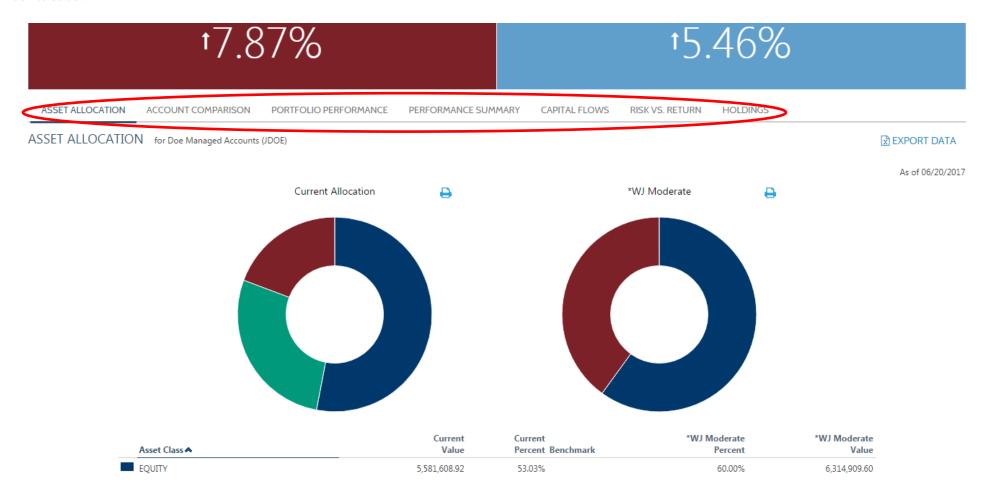
When you log into your client portal, you will first see the dashboard page. At the top you will see colored tiles that provide quick information regarding your portfolio. You can return to the dashboard at any time by clicking **the 4 squares icon as circled below**:



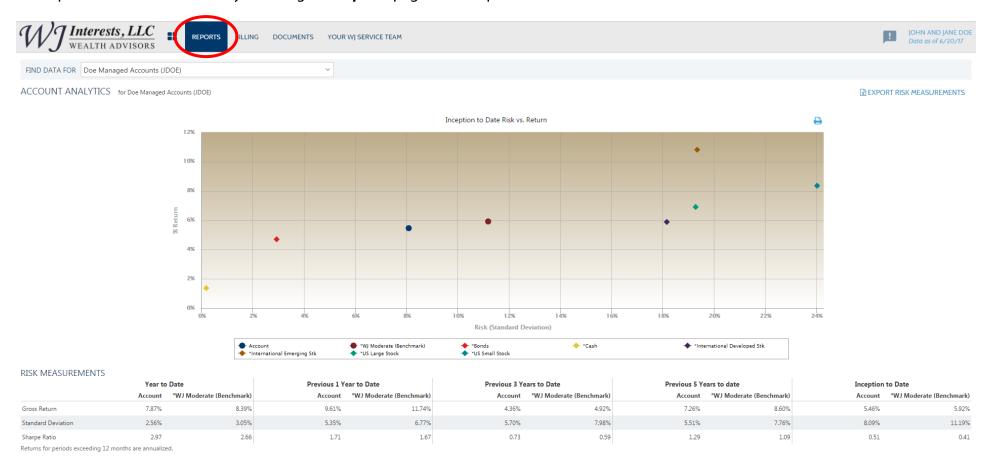
When viewing your dashboard, be sure that you are viewing the data at the **group level**. Your group is the consolidated view of all your accounts. WJ manages your portfolio at the group level. To ensure you're viewing your portfolio at the group level, check that the **Find data for:** pull-down menu reads {Your Last Name} Managed Accounts, followed by a four-letter code. You can also click where it says "Groups" below:



Once you have the group selected, you are ready to view your reports. Most of the information you need will be on the dashboard underneath the tiles as shown below. Each tab presents a unique report about your portfolio. If you have questions about the individual reports, please contact us.

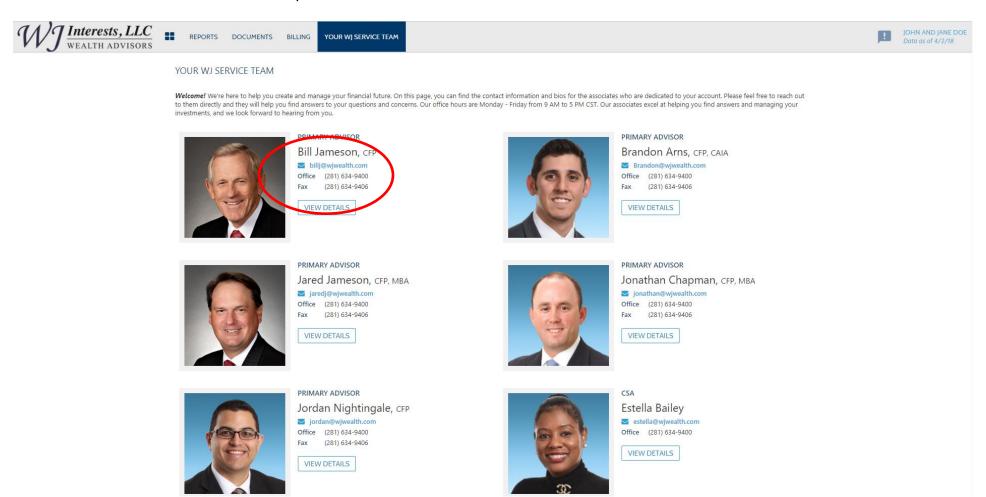


The reports can also be viewed by selecting the **Reports** page at the top as circled below:

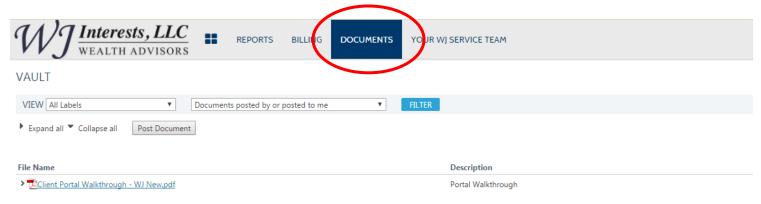


Chargo Datio is a measure of rick adjusted performance calculated by dividing your return by the amount of rick required to achieve it

Under the **Your WJ Service Team page**, you can see your service team at WJ and their contact information. Also by clicking the **VIEW DETAILS** button, you can view their bio, including their responsibilities at WJ. You can contact your service team directly from this page by clicking on the **email address** next to the team members photo.



Your portal also has a direct link to your **document vault**, in which you can view posted documents, such as your last four quarterly statements, latest financial plan and latest investment policy statement. You can access the vault from the dashboard, or by going to the **Documents tab** and clicking **Vault**, then clicking on the appropriate file link to view. You also can post your own documents by clicking **Post Document**:



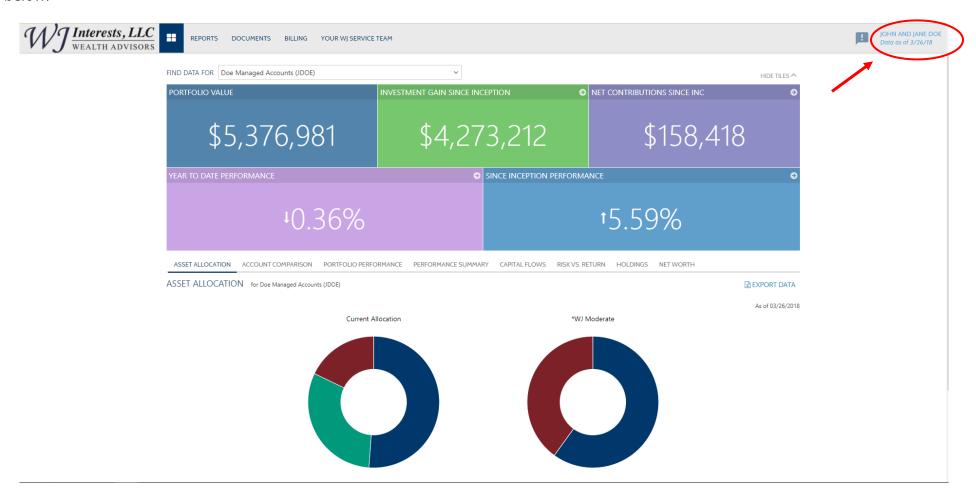
If you have any additional questions about your portal, please email or call us at 281-634-9400.

Recently, all WJ Client Portals have been updated with a service called Yodlee. Yodlee is an account aggregation service recently acquired by Envestnet, the company whose platform we use for your WJ Portal. With this update, you will now be able to see all of your assets and liabilities, updated in real time, on your WJ Portal. Having all of your financial account data in one place will make it much easier for you to have a clear view of your overall financial picture. It will also help WJ Interests produce better and more up to date financial plans. We ask that all clients please follow the instructions below to link your accounts in the portal.

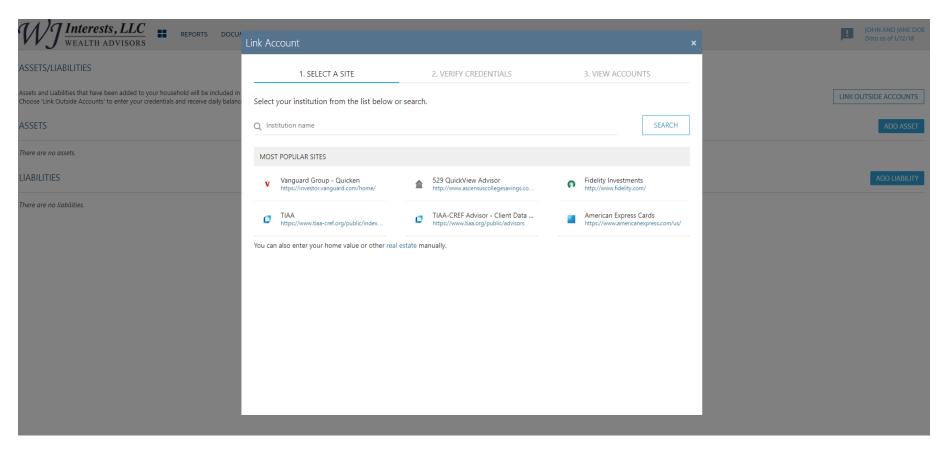
First, log in to your WJ Portal <u>here</u>. If you are having trouble remembering your password, or you have not logged in before, please click "Recover it here" as circled below.



Once you have logged in, please move your cursor over to the far right and hover over your name, then click "Assets and Liabilites" as circled below:

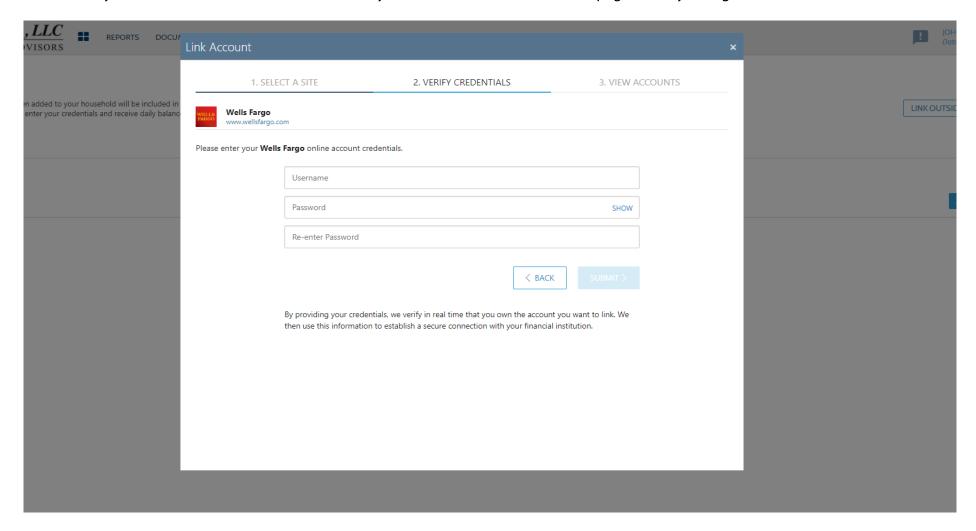


Once you click "Assets and Liabilities", click the button "Link Outside Accounts" which will show a pop-up as below:

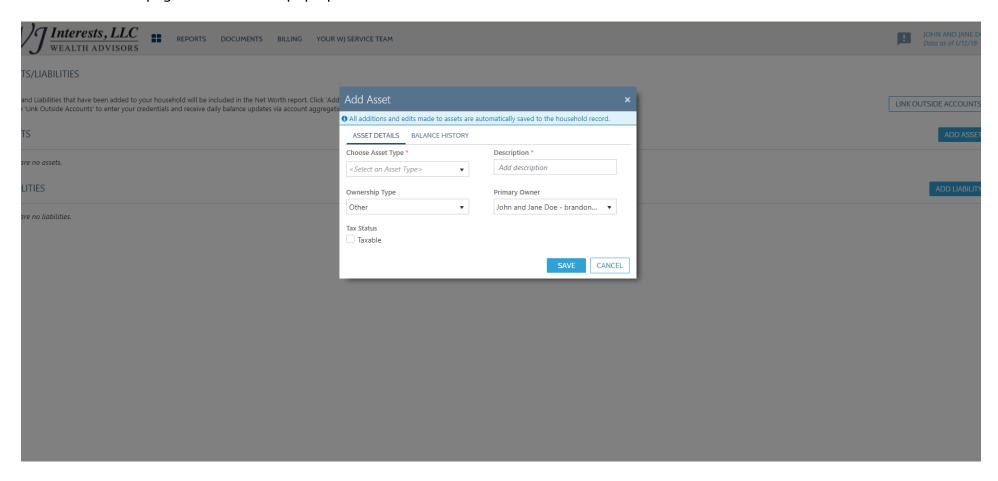


Type in the name of any financial institution with which you have an account. For example, if you have a checkings account at Wells Fargo, simply type "wells fargo" and select the appropriate result.

Once you click the appropriate result, you will be asked to enter your account credentials. Simply put in your user name and password and click "Submit". Wait for your accounts to be linked and then simply close the pop-up. You will now see those accounts added to your net worth. (Note: You may want to edit the account name manually after its on the assets/liabilities page if the system gives it an unintuitive name.)

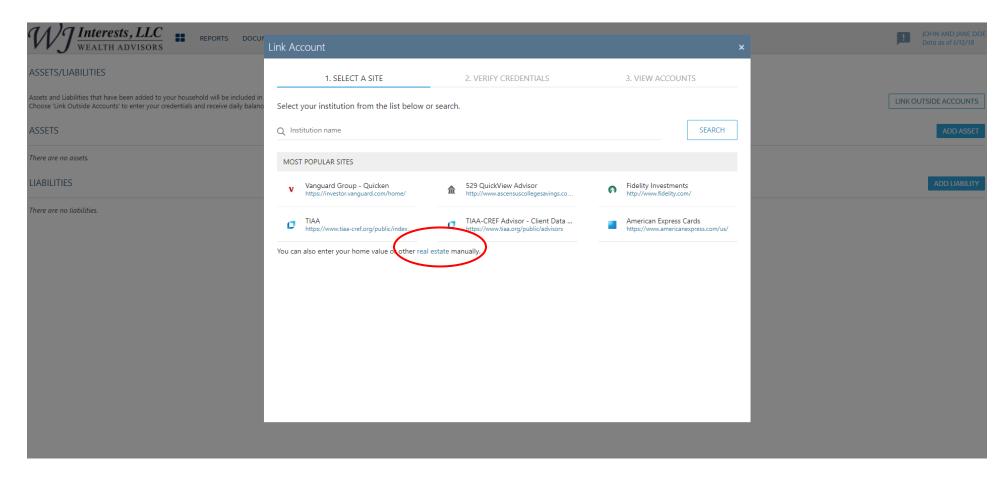


If you want to add an asset or liability manually (without linking to a financial institution online), click the add asset or add liability option on the "Assets/Liabilities" page. There will be a pop-up as shown below:

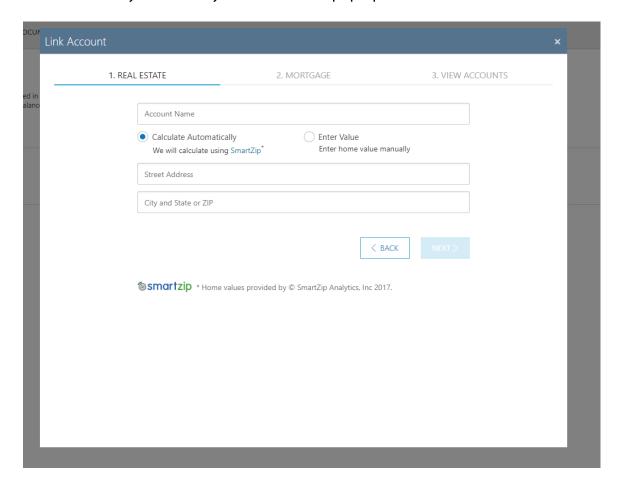


This section is perfect for personal property (excluding home), collectibles, outside private partnerships etc. Fill in the details and click save once you are finished.

For your house, click "Link Outside Accounts" as you did before. This time instead of typing in your financial institution, click the real estate link circled below:



Type in a name for the property, leave on "Calculate Automatically" (if you want the value to stay up to date), type in the address and click next. It will tell you the house has been successfully linked and you can close the pop-up.



Once you have all of your assets and liabilities linked, we will add a "Net Worth" report that will show your full financial picture updated daily. We think Yodlee will be a wonderful feature that will add simplicity to your financial life. If you need help with any step in the process, please call WJ Interests at 281-634-9400 or shoot us an email.