

Getting Started

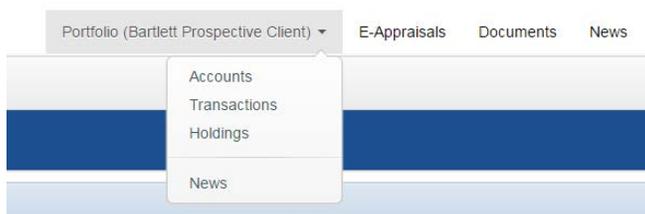
Navigating your Portal is very easy. This guide should help get you familiar with the basics. The guide includes how to navigate the app, use headlines, view statements, the document center, mobile access and changing your password.

Main Portal

When you login, you'll land where you can view information about your consolidated portfolio. The homepage gives you a summary of your portfolio with charts providing information about your asset allocation, accounts, and top holdings. Navigate these charts by simply clicking on the "Next" or "Previous" (located to the left and right of the charts). If you are on a tablet device, use your finger to swipe through these charts.



You can also go directly to a listing of accounts, transactions, and holdings by clicking the arrow next to your name at the top of the screen.



On the left-hand side, you will notice Headlines that provide "at-a-glance" information. Clicking on any of these takes you to additional detail about that particular headline.

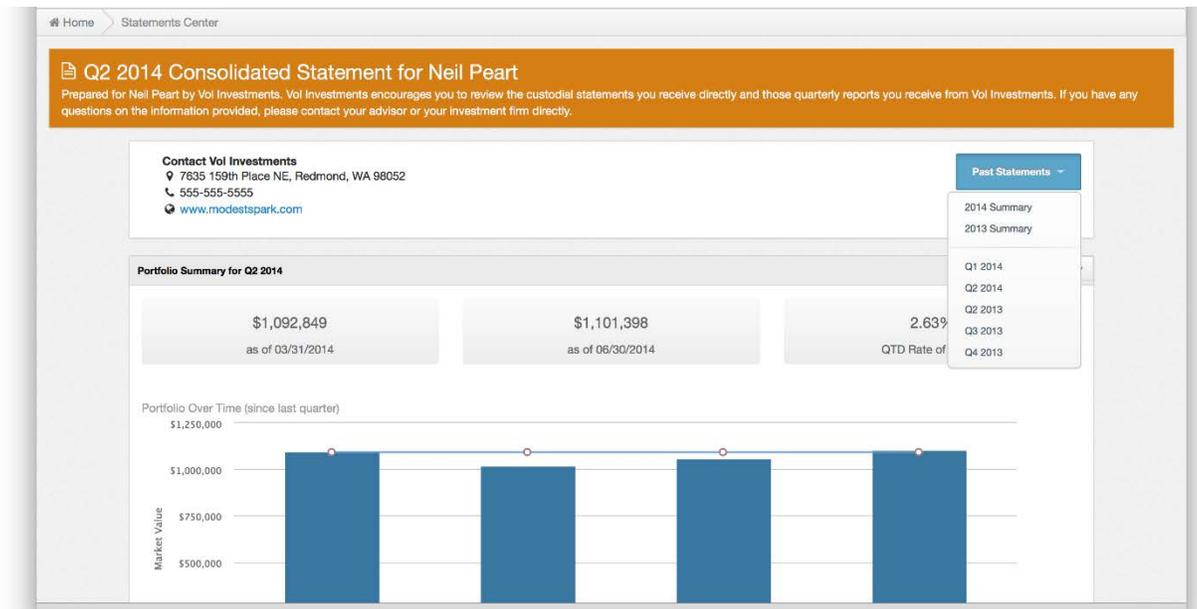
If you need to return to the Portal Home, simply click on the Bartlett logo located in the upper left corner.

E-Appraisals

From your main menu, click on "E-Appraisals". E-Appraisals provide a historical view of your investments.

Each report gives you a snapshot of:

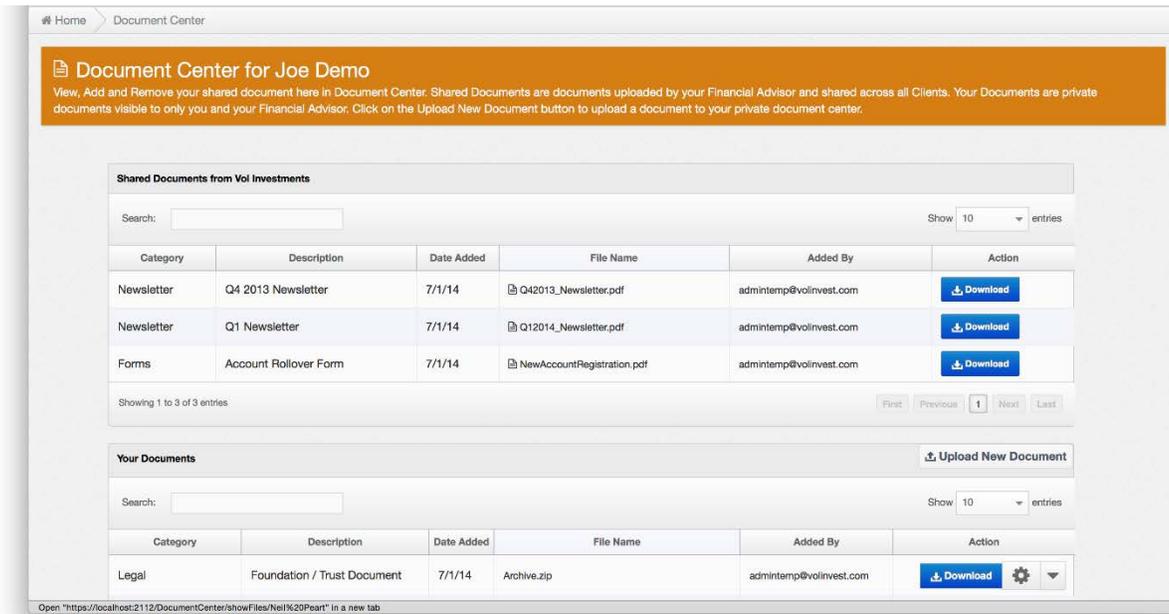
- Your consolidated portfolio (all accounts under management)
- Individual account information
- Account holdings
- Asset Allocation



Use the blue dropdown box labeled "Past E-Appraisals" to select the appropriate time period (Quarter or Yearly) for your viewing.

Document Center

Document Center is a secure place to keep important documents for reference and also to share with your financial advisor. It also provides a way for your advisor to share important documents (newsletters, custom reports, etc.) with you. From the Client Portal Home, click on the "Documents" link to access the Document Center. Here you will see the Shared Documents (published by your financial advisor) and your personal Documents (only accessible by you and your advisor). You can download or remove (only your personal documents) these documents and also upload new documents from the Center.



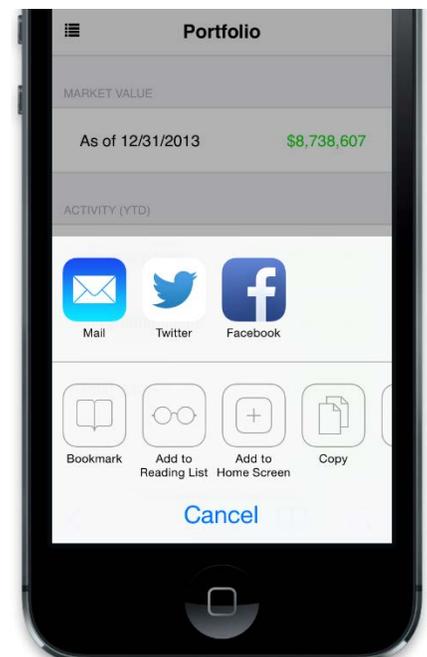
Mobile Access

Your Portal is very mobile-friendly and supports most modern smartphones and tablets. Follow these steps to get mobile access to your Client Portal:

- Open Your Portal in your mobile browser
- Login using your username / password
- You'll see a prompt to install the app icon on your device.
- Done!

Note: based on your type of device (Apple, Android, Microsoft), please add the app link to your home screen. For Apple device, this is done by tapping on the "Add to Home Screen" button. For Android, tap on the "Bookmarks" to add bookmark the app and add it to your home screen

Now you'll have an app icon that you simply tap to access!



Changing your password

We recommend you change your initial password and select a password that is not easily identifiable. Changing your password in your Portal is easy.

- Click on your name in the upper-right corner of the app
- Select "Change Password"
- Enter your existing password
- Enter a new password and verify
- Click on "update password"
- Done!

If you ever forget your password, simply go to the login page and click on "Forgot your password?" This will reset your password and email you with a new temporary password to use.

Enjoy your Portal!

We sincerely hope you enjoy your Portal experience. Should you need assistance with the product, please call Bartlett at 513.621.4612.

If you run into technical issues or questions of any kind you can reach our support via email at paperless@bartlett1898.com.
