BROOKSTONE Wealth Management

# Using the Client Web Portal

MORNINGSTAR Office

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The Client Web Portal (CWP) is a secure web site that you can can log into using your email and a custom password. In addition to providing real-time visibility into your accounts and portfolios, the CWP also acts as a two-way communication vehicle, allowing you to upload documents and receive performance reports from Meld Financial, securely. The following topics are covered:

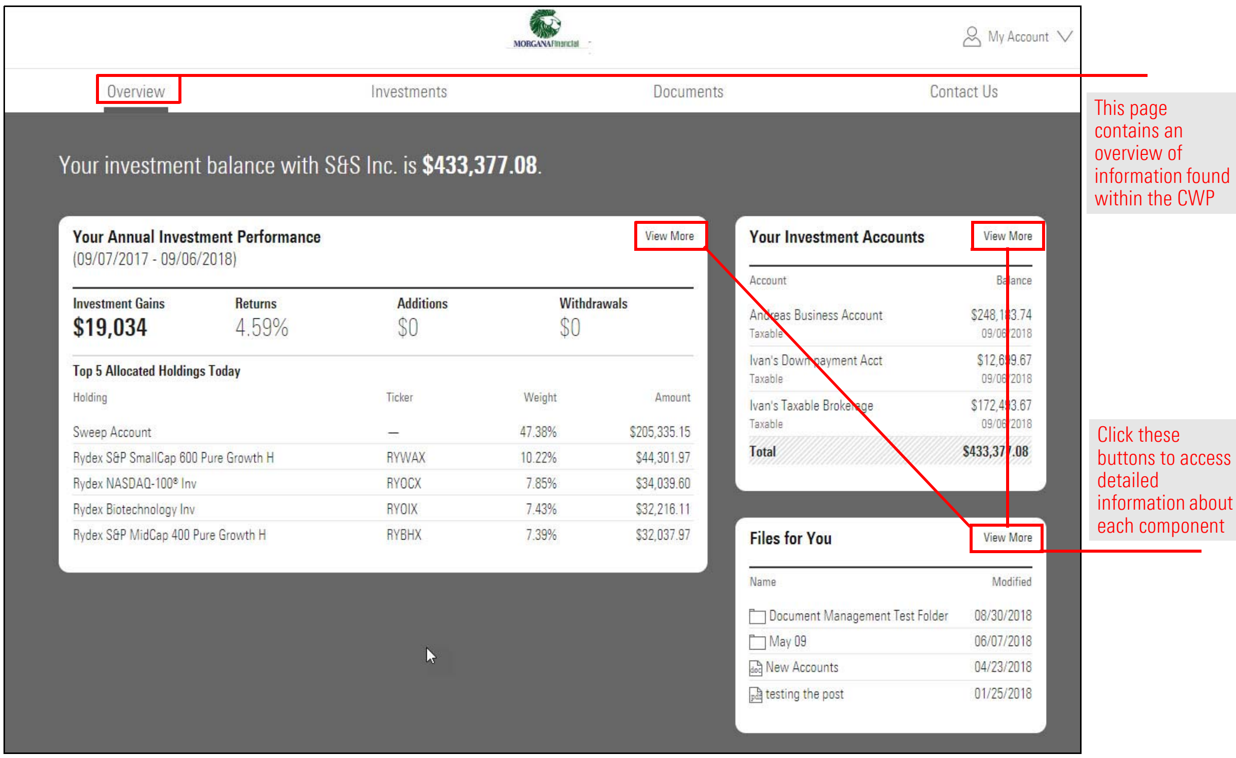
# Using the Overview page

## Overview

Now that you've logged in, review the different information and functionality available. This section describes what's available on the Overview page.

## What information do I find within the Overview page?

After logging in, you are brought to the Overview page. This page acts as your dashboard, providing high-level information at a glance from other pages within the CWP. To view additional information, click the View More icon within the upper right corner of each component.



Begin by reviewing the total balance within the clients portfolio. Underneath, you find three components containing the following information:

| **This component …** | **Contains this information …** |
|---|---|
| Your Annual Investment Performance | Investment information including the following:<br>▸ Investment Gains<br>▸ Returns<br>▸ Additions<br>▸ Withdrawals, and<br>▸ Top five holding |
| Your Investment Accounts | Account balances for each underlying account within your portfolio. |
| Files for you | Links to folders and documents most recently posted by Meld Financial, Inc. |

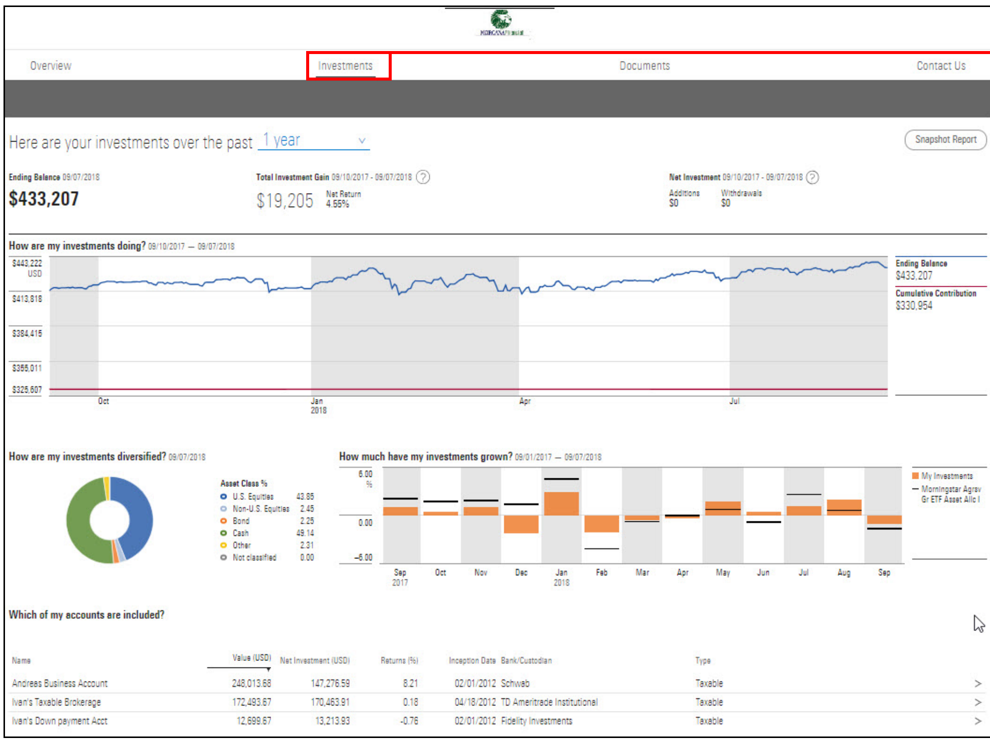
# Using the Investments page

## Overview

This section describes what's available in the Investments page.

## What information do I find within the Investments page page?

The Investments page provides information related to the investments within your portfolio. The top half includes data points and graphs showing how your investments are performing. The bottom half includes limited details about the account constituting your portfolios.




This page contains information about the investments within a portfolio

From the Investments page, your clients have to ability to select their time frame for data. Choose from the following options:

- Since Inception
- 1-year
- 3-year
- 5-year
- 10-year, and
- YTD.


☞ Note: You will see only as much data as is available. For example, if you select the 10-year time frame, your account has been open for only 5 years, your will see 5-years worth of data.

Below the header, figures for Ending Balance, Total Investment Gains, and Net Investment are displayed at the portfolio level.


The start date for these data points is controlled by the time frame you chose. The following table provides the end date and definition for each data point:

| This data point … | Uses this end date … | With this definition … |
|---|---|---|
| Ending Balance | End of previous day | Ending balance of the entire portfolio as of close of business the previous day. |
| Total Investment Gain | Previous Month End | The overall increase or decrease in a portfolio's market value including or excluding management fees. |
| Net Investment | Previous Month End | The total of all additions minus withdrawals made to a portfolio between the start and end dates. |

Last, review the charts and a table below. The following table describes each one:

| This component ... | Provides this information ... |
|---|---|
| How are my investments doing? | This line chart shows how the value of your portfolio has changed over the time period you have chosen. It also includes a cumulative contributions line.<br>Click anywhere on the line to see an exact figure for a specific month. |
| How are my investments diversified? | This donut chart shows what percentage of your investments fit into each asset class. |
| How much have my investments grown? | This bar chart shows how your investments have performed. |
| Which accounts are included? | This table includes the accounts comprising your portfolio, along with limited details about each account. Click on the icon next to each account to open the Account Details page for transactional accounts only,<br>Each Account Details page contains the same content as the Investments page, however a list of holdings replace the list of accounts at the bottom of the page. Click on any holding to launch the Morningstar page. |


Click on an arrow to launch individual account details

# Using the Documents page

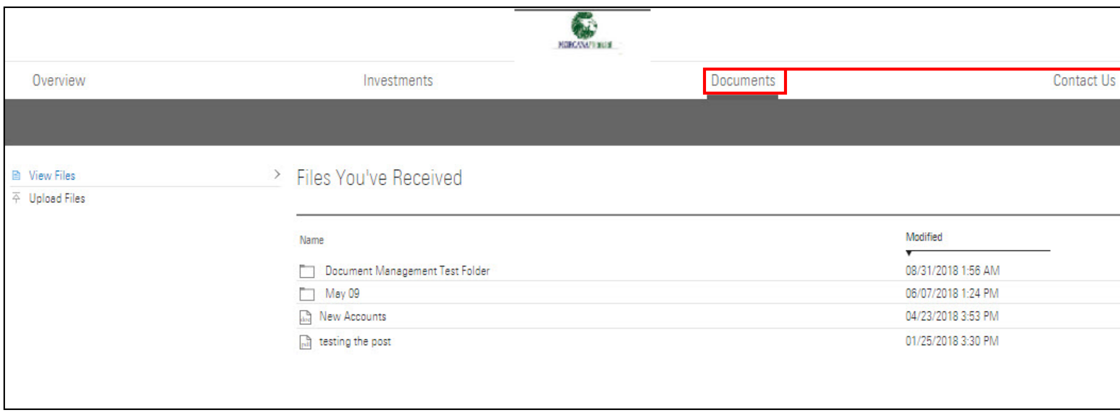
## Overview

The Documents page offers access to paperless statements and documentation, and you can securely send documentation directly to me. The Documents page is broken into two sub-pages:

- Upload Files, and
- View Files.

To access the documents page, type fp.morningstar.com into any browser, and log in using your email and custom password.

To see files sent from me to you, select the View Files page. The next section explains how you can upload files to me from the Upload Files page.




All document are stored within this page

## How do I upload documents to you?

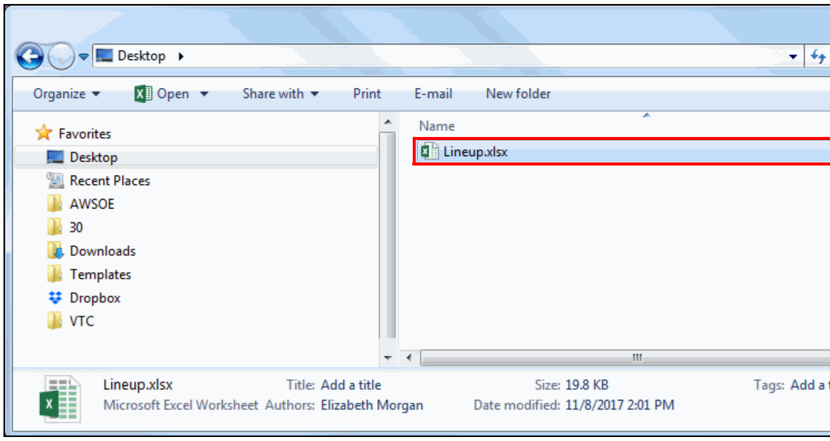
Uploading documents is easy and efficient. To upload a document, do the following:

1. From the CWP landing page, click **Documents** and remain on the **Upload Files** sub-page.
2. Click **Upload**. The document will appear first under Files You've Shared.


You can upload documents to me using this button

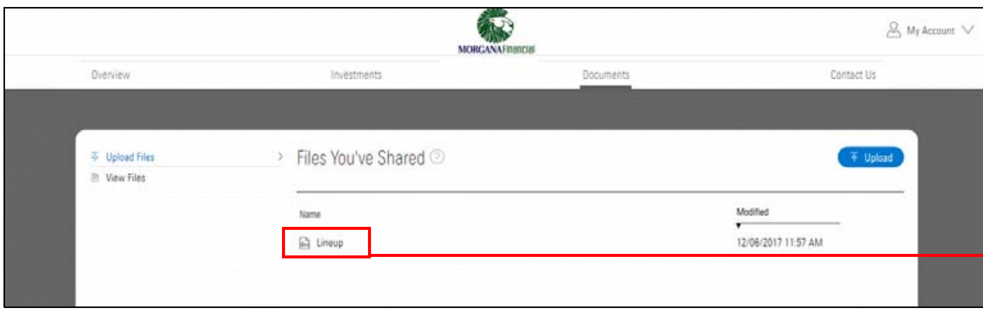
☞ Note: The first time you upload a document, the Upload button appears in the center of the page.

3. Navigate to the **document** you want to upload, and **double-click** to select it.




Double click the document from this panel

4. Once uploaded, your document will immediately be available within the **Upload files** sub-page. The document will also be delivered to me.




All uploaded documents will be available here