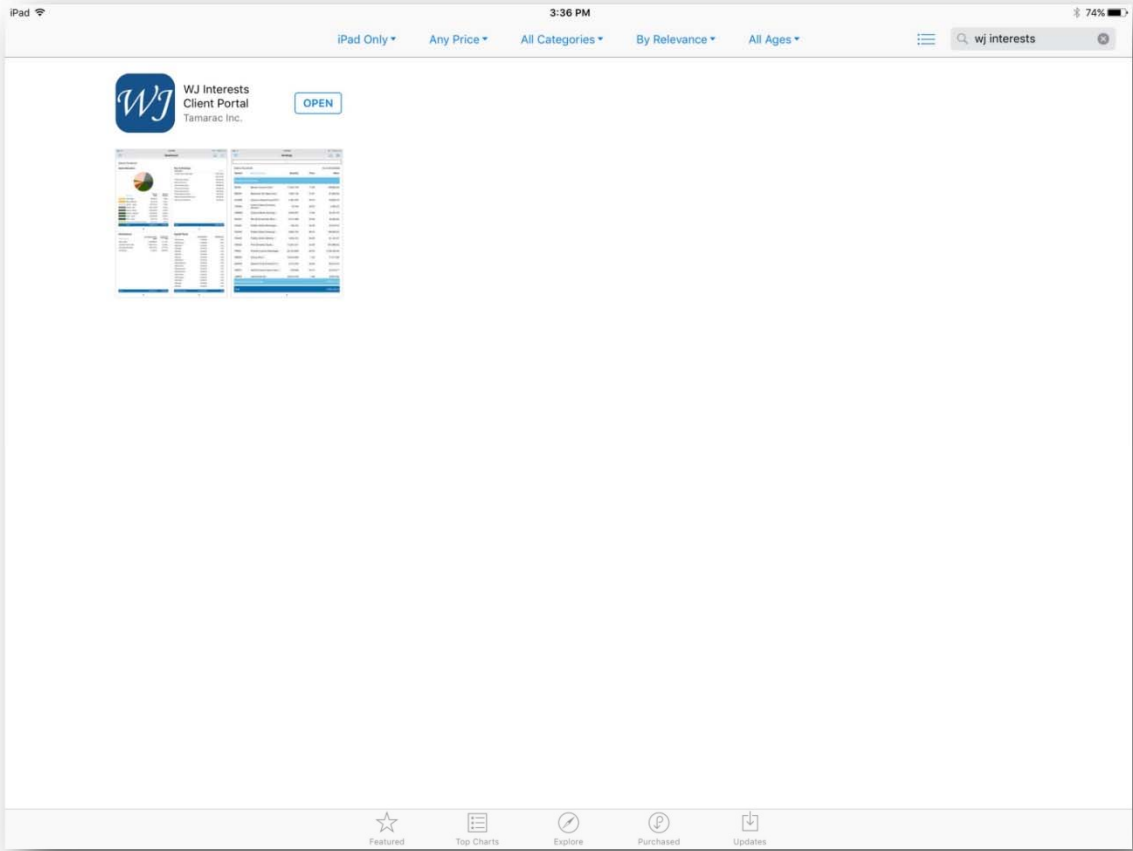


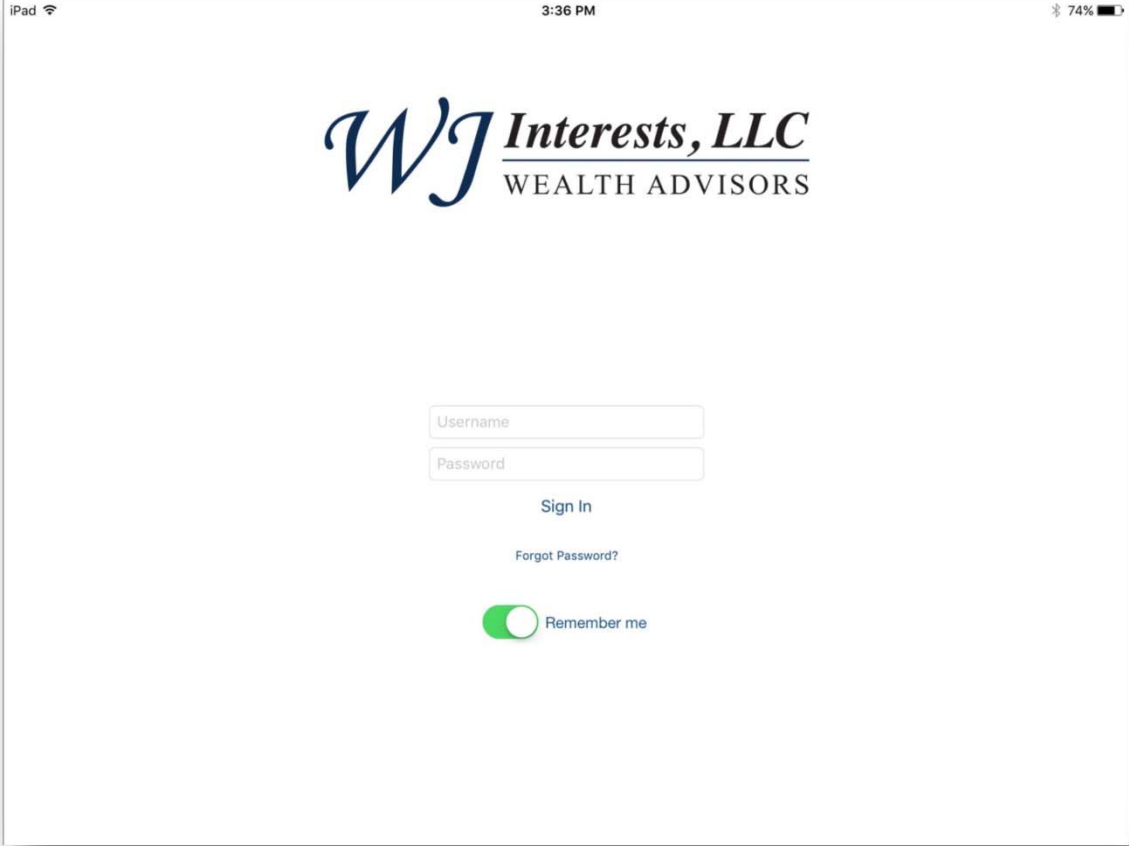
WJ CLIENT PORTAL WALKTHROUGH FOR iPad APP

Search for “WJ Interests” in the search menu in the app store and the appropriate app will show up as displayed below. The app is free to download for all our clients.



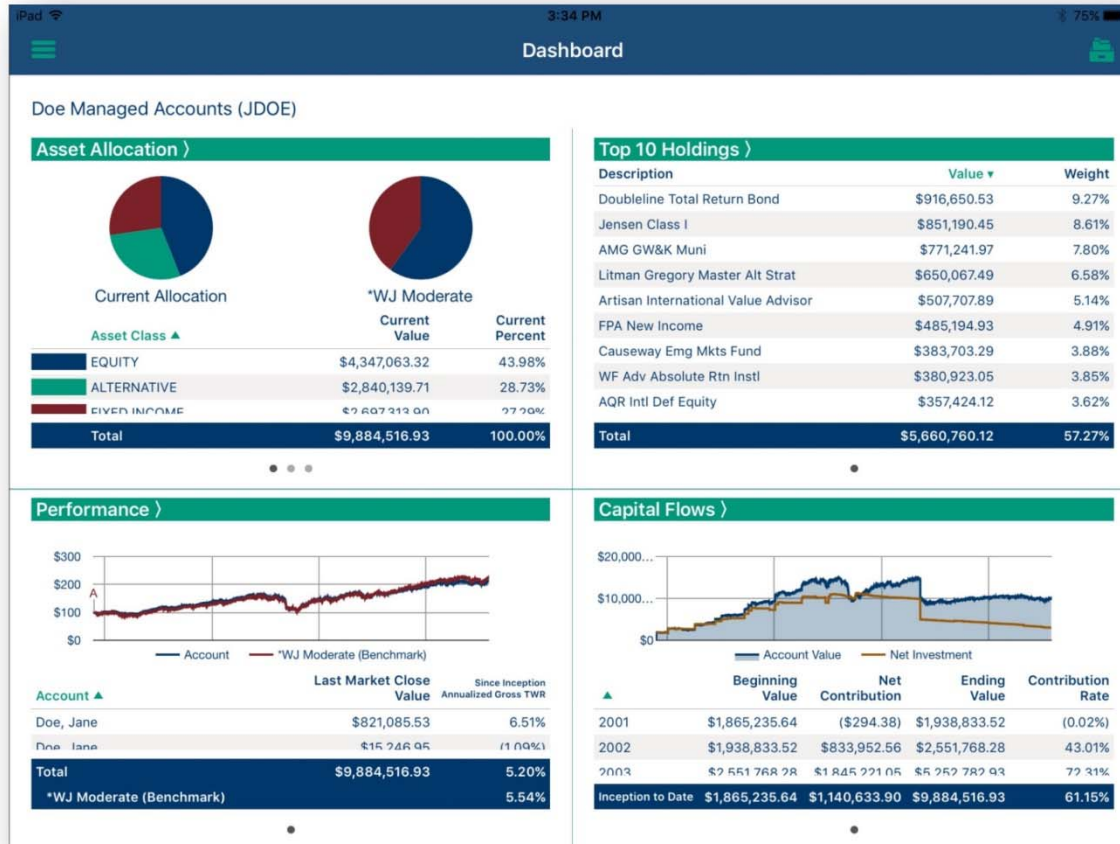
WJ CLIENT PORTAL WALKTHROUGH FOR iPad APP

When you open the app, you will be taken to a login screen. Type in the same user name and password that you use for the desktop version.



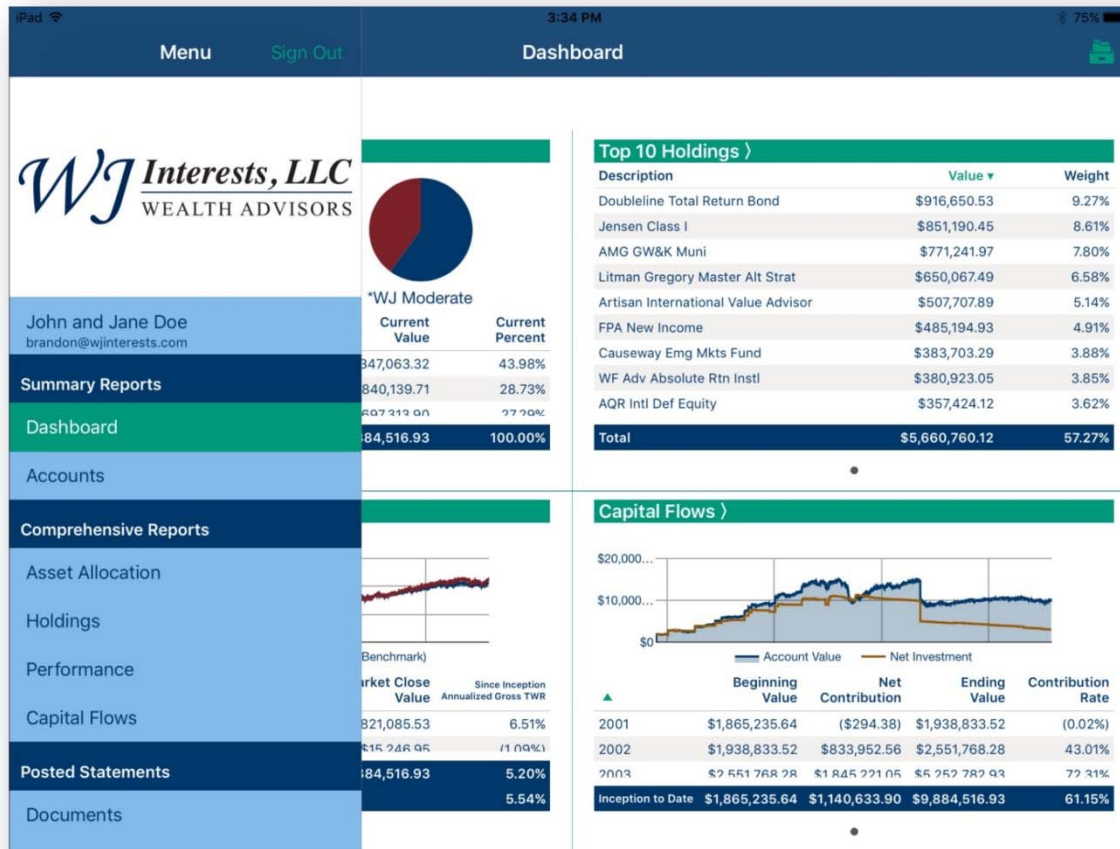
WJ CLIENT PORTAL WALKTHROUGH FOR iPad APP

Just as with the desktop version, when you first log in, you will be taken to your dashboard. Your dashboard contains a summary of your holdings, performance, asset allocation and capital flows data.



WJ CLIENT PORTAL WALKTHROUGH FOR iPad APP

You can also access these reports by tapping on the three lines in the top-right corner to open the main menu.



WJ CLIENT PORTAL WALKTHROUGH FOR iPad APP

The full performance, capital flows, holdings and asset allocation reports are shown below.



Symbol	Description	Open Date	Cost Basis	Quantity	Price	Value
EQUITY						
AIMIX	AQR International Momentum	1/5/15	\$191,209.00	14,141.20	\$13.43	\$189,916.29
ANDIX	AQR Intl Def Equity	1/5/15	\$344,713.00	31,080.36	\$11.50	\$357,424.12
QICLX	Aqr Intl Multi Style	1/5/16	\$321,039.00	31,441.63	\$9.90	\$311,272.10
QCELX	AQR US Core Equity	1/5/15	\$189,342.20	13,890.65	\$13.30	\$184,745.66
ALEX	AQR US Defensive Equity	9/5/15	\$25,020.00	1,693.77	\$15.13	\$25,626.69
AFDYX	Artisan Dev World Fd Adv	12/30/15	\$326,386.87	37,046.41	\$9.16	\$339,345.12
AFDIX	Artisan International Value Advisor	12/26/12	\$491,390.93	36,026.13	\$31.68	\$507,707.89
CEMEX	Causeway Emg Mkts Fund	1/5/16	\$363,801.00	39,844.58	\$9.63	\$383,703.29
EFIV	Gharies EAFE Min Vol ETF	5/31/12	\$217,797.37	4,263.00	\$66.88	\$286,109.44
EQUITY Total			\$3,679,358.93			\$4,347,063.32
Total			\$9,193,534.68			\$9,884,516.93



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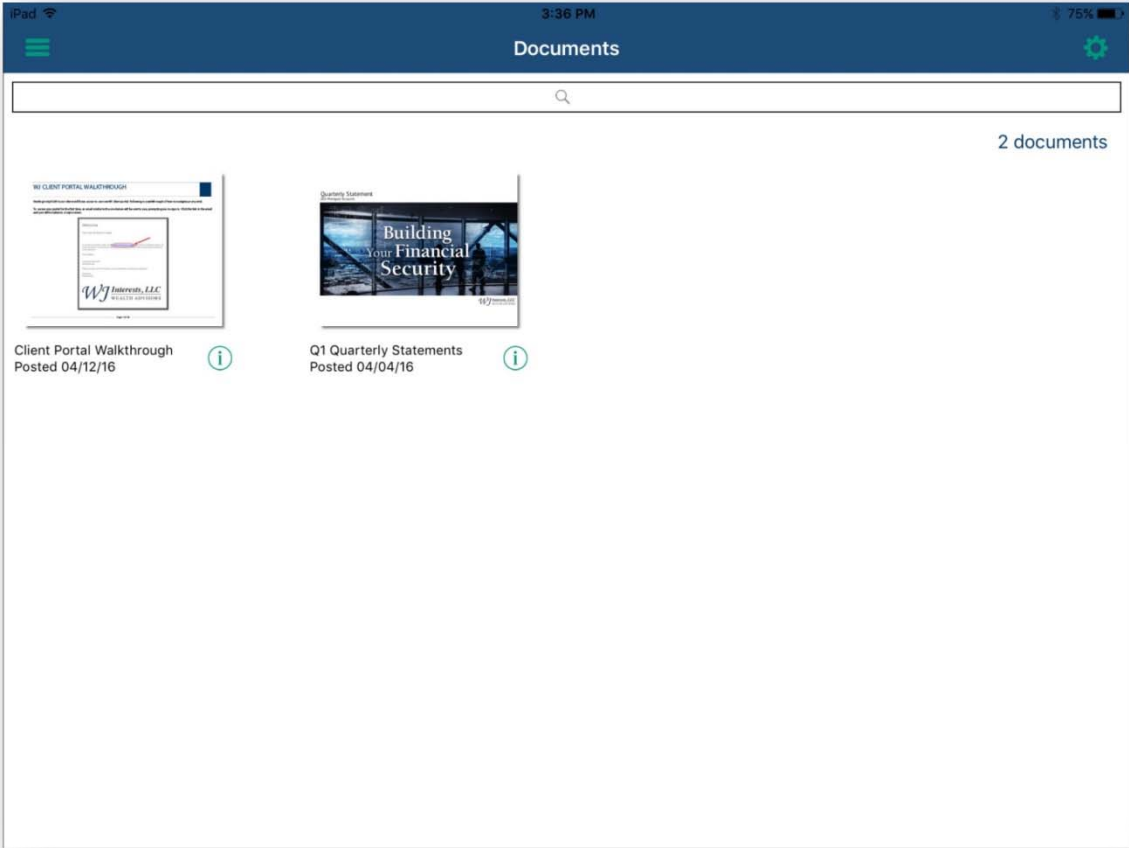
From this menu you can also tap "Accounts" to view all of your accounts with brief information on each.

The screenshot shows the 'Accounts' screen in an iPad app. At the top, there is a search bar and three filter tabs: 'All' (selected), 'Accounts', and 'Groups'. Below the filters, it indicates '9 accounts'. The main content is a table with the following columns: 'Account Name', 'Account Number', 'Account Type', and 'Last Market Close Value'. The table lists various accounts for 'Doe Managed Accounts', 'Doe, Jane', and 'Doe, John'.

Account Name ▲	Account Number	Account Type	Last Market Close Value
Doe Managed Accounts)	JDOE		\$9,871,471.04
Doe, Jane	1234-5676	Schwab Taxable	\$820,933.57
Doe, Jane	1234-5677	Schwab IRA	\$15,256.71
Doe, Jane	Doe401k2	401sd	\$0.00
Doe, John	1234-5678	Schwab Taxable	\$8,175,617.80
Doe, John	1234-5679	Schwab IRA	\$0.00
Doe, John	216543F3	Millennium IRA	\$51,073.02
Doe, John	doe401k	401k	\$0.00
Doe, John	doeai	Private	\$808,589.94

WJ CLIENT PORTAL WALKTHROUGH FOR iPad APP

To view your document vault on the iPad, simply tap “Documents” from the main menu. This will include the last four quarterly statements, a portal walkthrough, your latest investment policy statement and other reports if applicable. In the example below, the latest quarterly statement and walkthrough are shown.



WJ CLIENT PORTAL WALKTHROUGH FOR iPad APP



We are excited to release our new app and believe it will give you quick and easy access to up-to-date portfolio information. Currently, the app is only available on the iPad, but it will be available on other platforms in the future.

If you have any questions, please call us at 281-634-9400.