WJ CLIENT PORTAL WALKTHROUGH

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:

Welcome

Your new WJ Portal is ready!

To access your portal, simply visit the Client Portal Sign In page and enter the credentials below. To avoid any errors, we recommend copying the password from this email and pasting the password when signing in.

Email address:

Temporary Password:
tempPassword

When you sign in for the first time, you will be asked to change your password.

Thank you,
Brandon Arns

WJ Interests, LLC
WEALTH ADVISORS

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 WJ Interests website or with the URL https://wjinterests.portal.tamaracinc.com:

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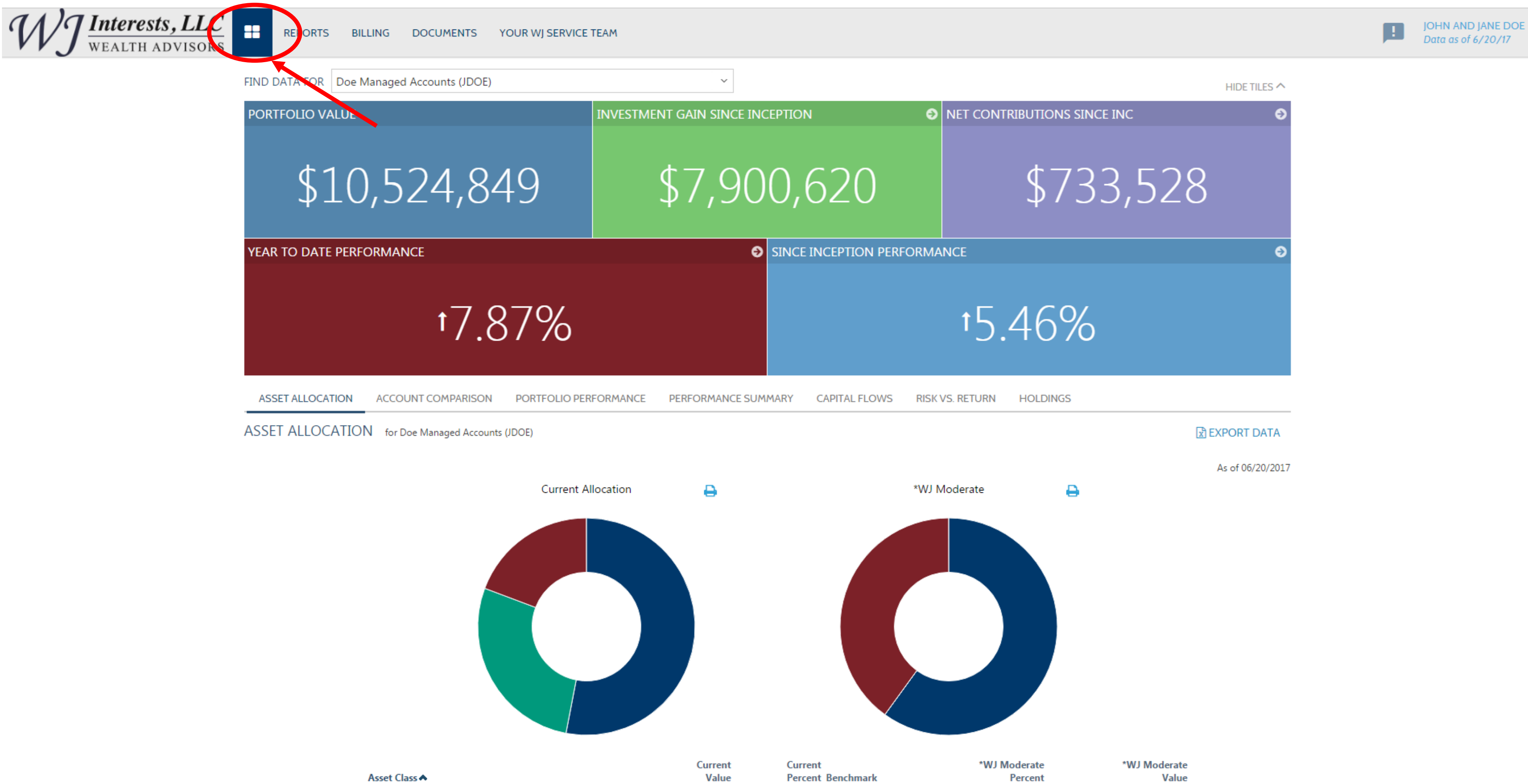
When you log into your client portal, you will first see the dashboard page. At the top you will see colored tiles that provide quick information regarding your portfolio. You can return to the dashboard at any time by clicking **the 4 squares icon as circled below**:



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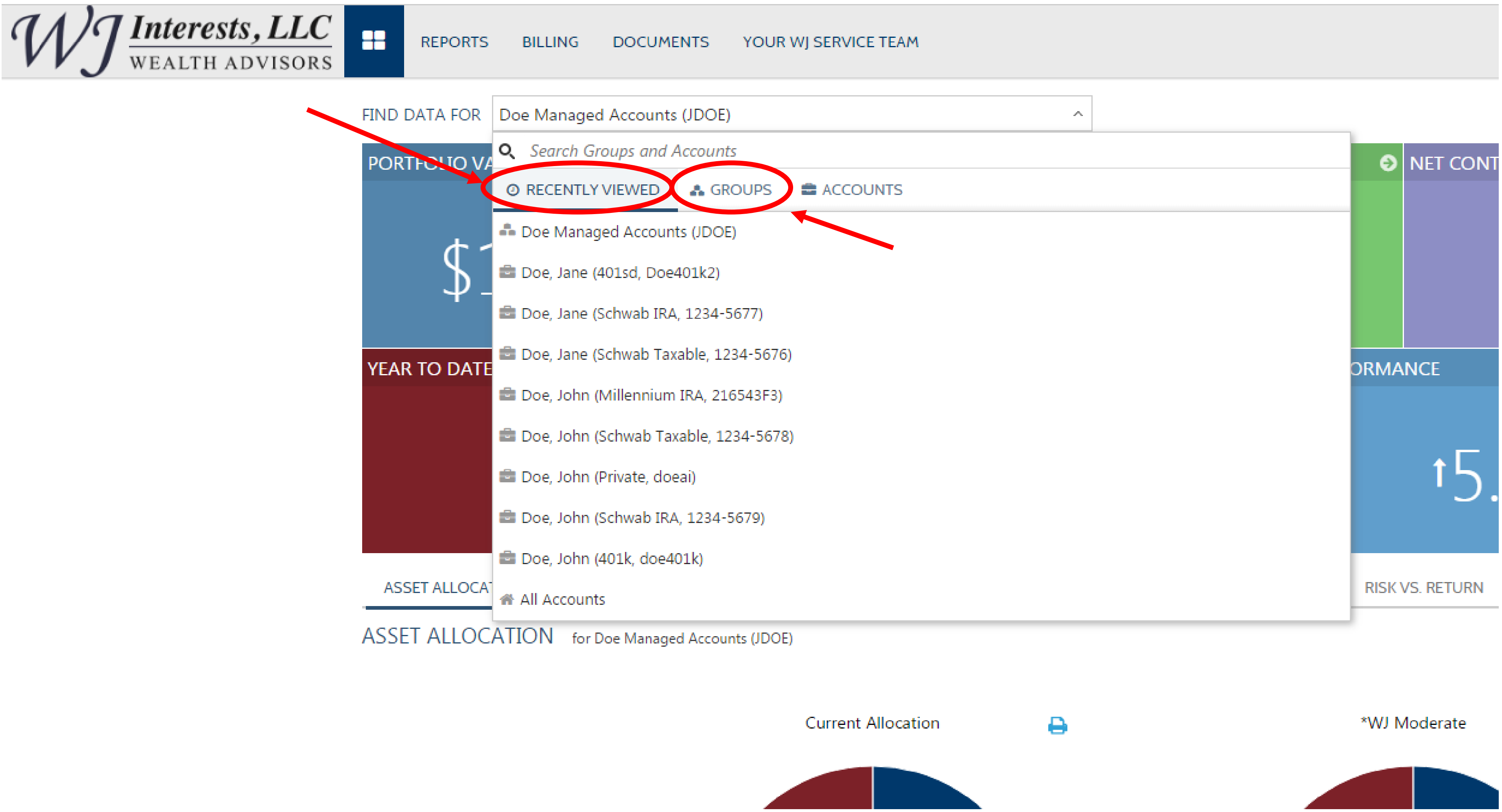
When viewing your dashboard, be sure that you are viewing the data at the **group level**. Your group is the consolidated view of all your accounts. WJ manages your portfolio at the group level. To ensure you're viewing your portfolio at the group level, check that the **Find data for:** pull-down menu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



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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.

↑7.87% ↑5.46%

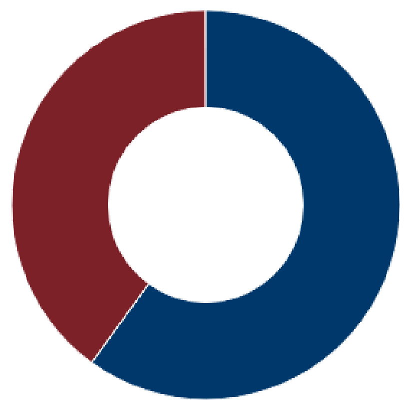
ASSET ALLOCATION | ACCOUNT COMPARISON | PORTFOLIO PERFORMANCE | PERFORMANCE SUMMARY | CAPITAL FLOWS | RISK VS. RETURN | HOLDINGS

ASSET ALLOCATION for Doe Managed Accounts (JDOE) EXPORT DATA

As of 06/20/2017

Current Allocation

*WJ Moderate



Asset Class	Current Value	Current Percent	Benchmark	*WJ Moderate Percent	*WJ Moderate Value
EQUITY	5,581,608.92	53.03%		60.00%	6,314,909.60

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

RISK MEASUREMENTS

	Year to Date		Previous 1 Year to Date		Previous 3 Years to Date		Previous 5 Years to date		Inception to Date	
	Account	*WJ Moderate (Benchmark)	Account	*WJ Moderate (Benchmark)	Account	*WJ Moderate (Benchmark)	Account	*WJ Moderate (Benchmark)	Account	*WJ Moderate (Benchmark)
Gross Return	7.87%	8.39%	9.61%	11.74%	4.36%	4.92%	7.26%	8.60%	5.46%	5.92%
Standard Deviation	2.56%	3.05%	5.35%	6.77%	5.70%	7.98%	5.51%	7.76%	8.09%	11.19%
Sharpe Ratio	2.97	2.66	1.71	1.67	0.73	0.59	1.29	1.09	0.51	0.41

Returns for periods exceeding 12 months are annualized.

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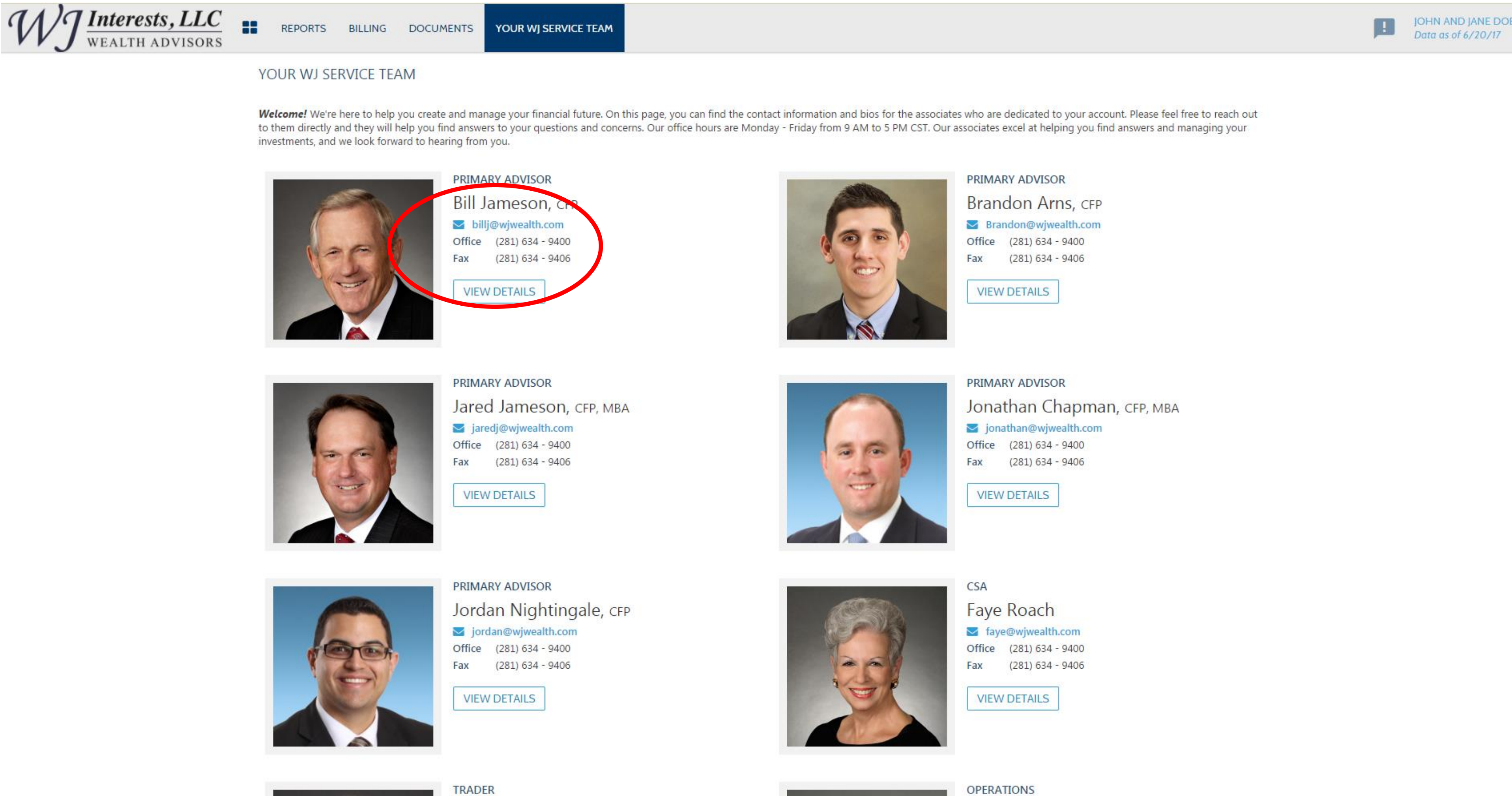
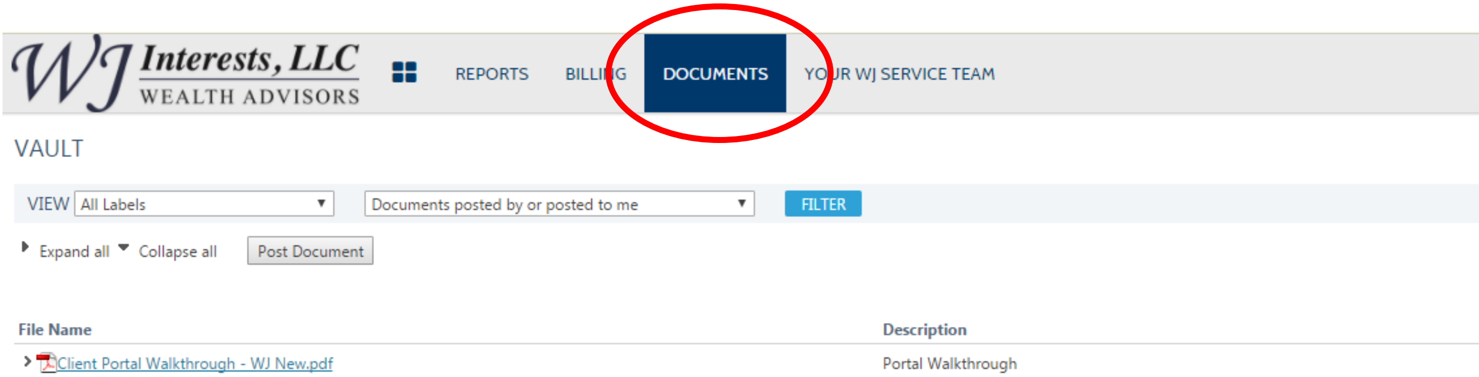
Under the **Your WJ Service Team page**, you can see your service team at WJ and their contact information. Also by clicking the **VIEW DETAILS** button, you can view their bio, including their responsibilities at WJ. You can contact your service team directly from this page by clicking on the **email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