

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:



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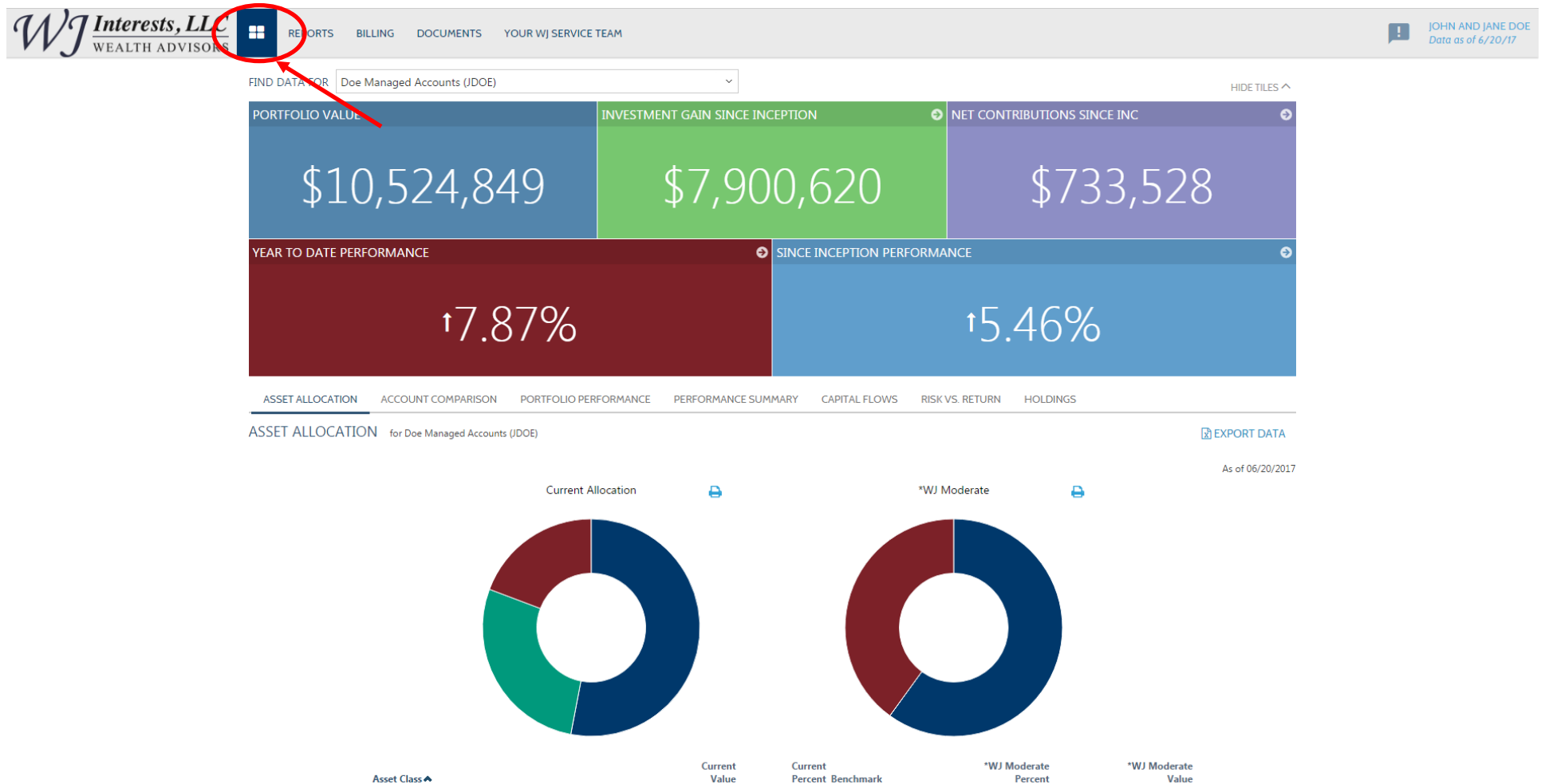
Type in your email address and the temporary password found in the email, and click Sign In. To reach this page again, add this login page to your Favorites on your internet browser, or return to through the [WJ Interests website](#) or with the URL <https://wjinterests.portal.tamaracinc.com>:



The screenshot shows the login interface for WJ Interests, LLC Wealth Advisors. At the top, the company logo features a large, stylized 'WJ' followed by 'Interests, LLC' in a serif font, with 'WEALTH ADVISORS' in a smaller, all-caps serif font below it. The main content area is titled 'Sign In' and contains two input fields: 'Email:' and 'Password:'. Below the password field is a checkbox labeled 'Remember me on this computer'. A 'Sign In' button is positioned below the checkbox. At the bottom of the form, there is a link that reads 'Did you forget your password? [Recover it here.](#)'

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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**:



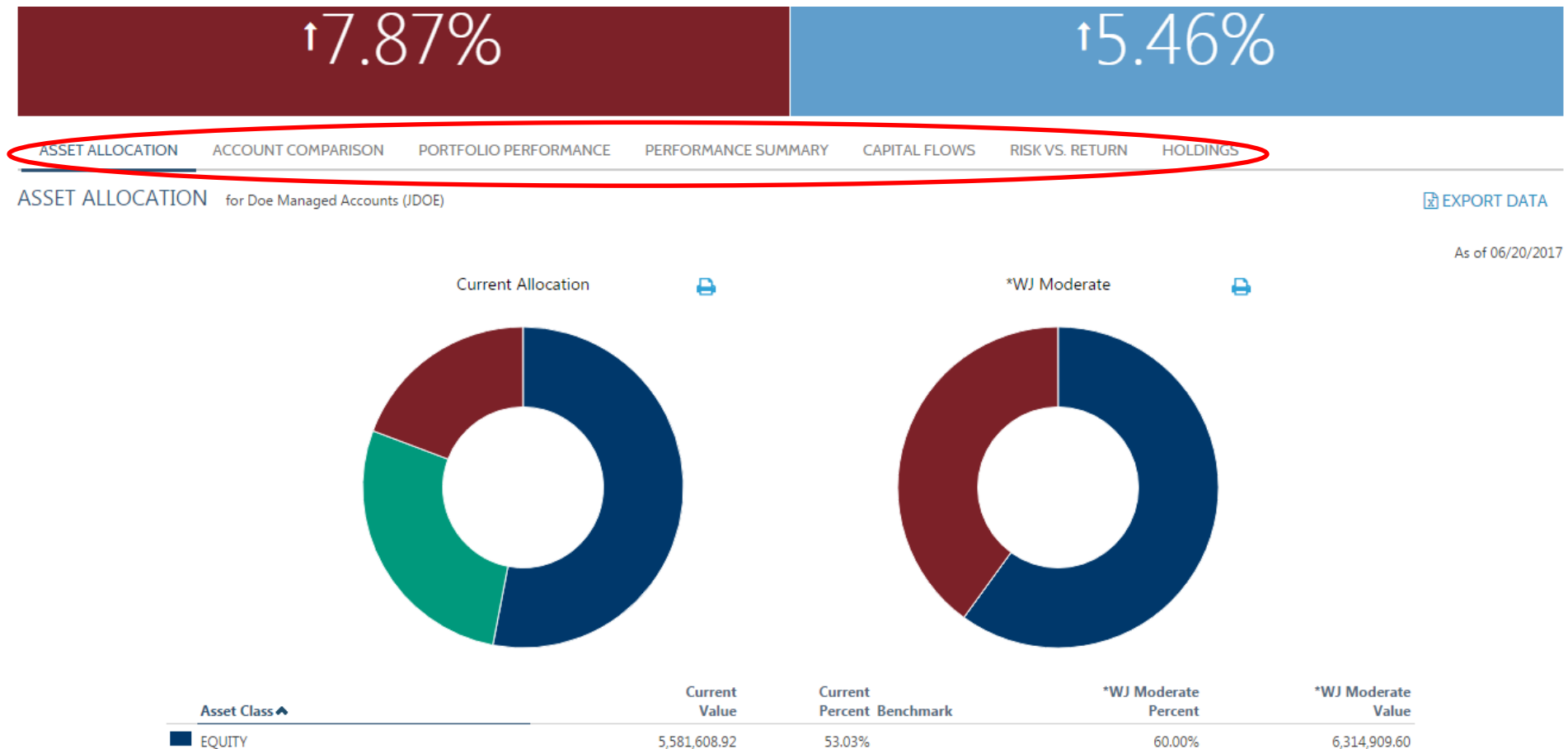
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When viewing your dashboard, be sure that you are viewing the data at the **group level**. Your group is the consolidated view of all your accounts. WJ manages your portfolio at the group level. To ensure you're viewing your portfolio at the group 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:

The screenshot displays the WJ Interests, LLC Wealth Advisors client portal. The top navigation bar includes 'REPORTS', 'BILLING', 'DOCUMENTS', and 'YOUR WJ SERVICE TEAM'. The main content area shows a 'FIND DATA FOR' dropdown menu set to 'Doe Managed Accounts (JDOE)'. Below this, a search bar is followed by three tabs: 'RECENTLY VIEWED', 'GROUPS', and 'ACCOUNTS'. The 'RECENTLY VIEWED' and 'GROUPS' tabs are circled in red, with a red arrow pointing to the 'GROUPS' tab. A list of accounts is displayed below, including 'Doe Managed Accounts (JDOE)', 'Doe, Jane (401sd, Doe401k2)', 'Doe, Jane (Schwab IRA, 1234-5677)', 'Doe, Jane (Schwab Taxable, 1234-5676)', 'Doe, John (Millennium IRA, 216543F3)', 'Doe, John (Schwab Taxable, 1234-5678)', 'Doe, John (Private, doesai)', 'Doe, John (Schwab IRA, 1234-5679)', 'Doe, John (401k, doe401k)', and 'All Accounts'. The background shows a 'PORTFOLIO VALUE' chart with a dollar sign, a 'YEAR TO DATE' performance bar, and an 'ASSET ALLOCATION' chart. The 'ASSET ALLOCATION' chart shows 'Current Allocation' and '*WJ Moderate' with a pie chart. The 'PERFORMANCE' chart shows a 15% increase. The 'RISK VS. RETURN' chart is also visible.


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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.



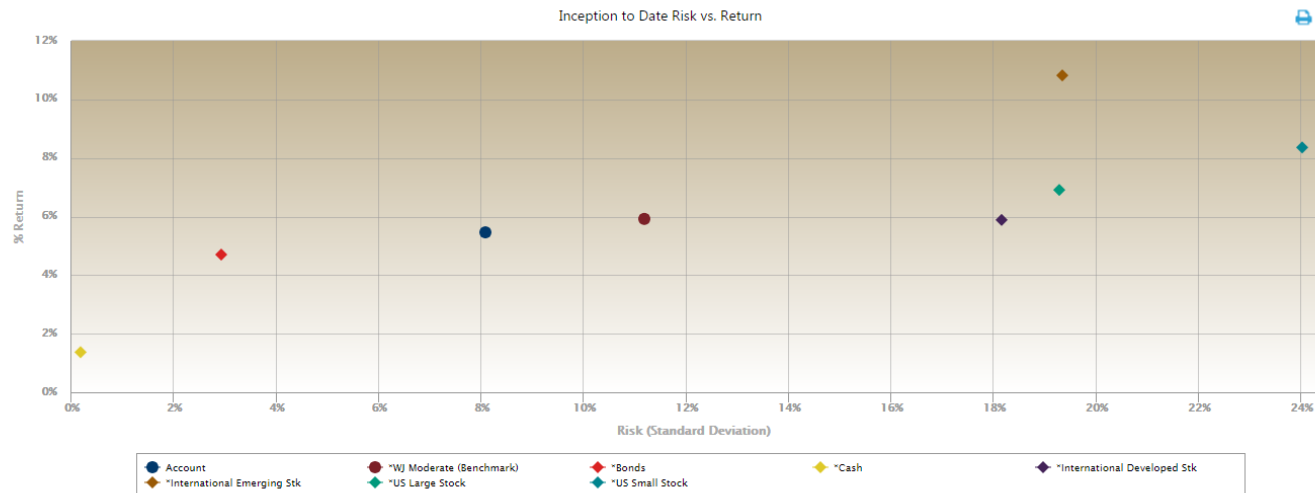
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The reports can also be viewed by selecting the **Reports** page at the top as circled below:


REPORTS
 BILLING DOCUMENTS YOUR WJ SERVICE TEAM

FIND DATA FOR
JOHN AND JANE DOE
Data as of 6/20/17

ACCOUNT ANALYTICS for Doe Managed Accounts (JDOE) [EXPORT RISK MEASUREMENTS](#)



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.

Sharpe Ratio is a measure of risk-adjusted performance, calculated by dividing your return by the amount of risk required to achieve it.

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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.



REPORTS

BILLING

DOCUMENTS

YOUR WJ SERVICE TEAM



JOHN AND JANE DOE
Data as of 6/20/17

YOUR WJ SERVICE TEAM

Welcome! We're here to help you create and manage your financial future. On this page, you can find the contact information and bios for the associates who are dedicated to your account. Please feel free to reach out to them directly and they will help you find answers to your questions and concerns. Our office hours are Monday - Friday from 9 AM to 5 PM CST. Our associates excel at helping you find answers and managing your investments, and we look forward to hearing from you.

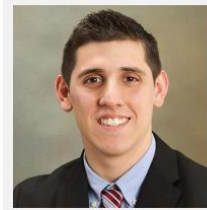


PRIMARY ADVISOR

Bill Jameson, CFP

✉ billj@wjwealth.com
Office (281) 634 - 9400
Fax (281) 634 - 9406

[VIEW DETAILS](#)



PRIMARY ADVISOR

Brandon Arns, CFP

✉ Brandon@wjwealth.com
Office (281) 634 - 9400
Fax (281) 634 - 9406

[VIEW DETAILS](#)



PRIMARY ADVISOR

Jared Jameson, CFP, MBA

✉ jaredj@wjwealth.com
Office (281) 634 - 9400
Fax (281) 634 - 9406

[VIEW DETAILS](#)



PRIMARY ADVISOR

Jonathan Chapman, CFP, MBA

✉ jonathan@wjwealth.com
Office (281) 634 - 9400
Fax (281) 634 - 9406

[VIEW DETAILS](#)



PRIMARY ADVISOR

Jordan Nightingale, CFP

✉ jordan@wjwealth.com
Office (281) 634 - 9400
Fax (281) 634 - 9406

[VIEW DETAILS](#)



CSA

Faye Roach

✉ faye@wjwealth.com
Office (281) 634 - 9400
Fax (281) 634 - 9406

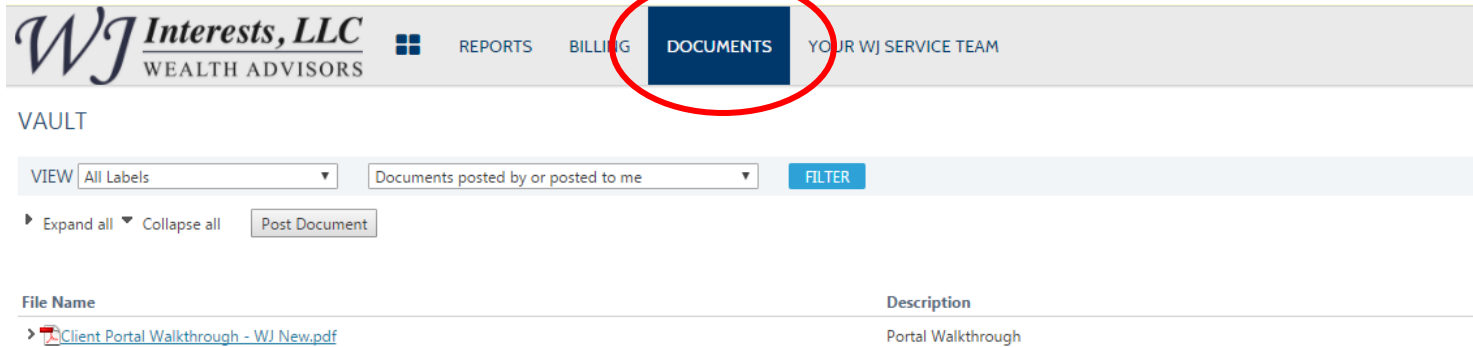
[VIEW DETAILS](#)

TRADER

OPERATIONS

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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**:



The screenshot shows the top navigation bar of the WJ Interests, LLC client portal. The navigation items are: WJ Interests, LLC WEALTH ADVISORS, a grid icon, REPORTS, BILLING, DOCUMENTS (highlighted with a red circle), and YOUR WJ SERVICE TEAM. Below the navigation bar is the VAULT section, which includes a VIEW dropdown menu (set to All Labels), a filter dropdown menu (set to Documents posted by or posted to me), and a FILTER button. There are also links for Expand all, Collapse all, and Post Document. Below this is a table with two columns: File Name and Description.

File Name	Description
> Client Portal Walkthrough - WJ New.pdf	Portal Walkthrough

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