

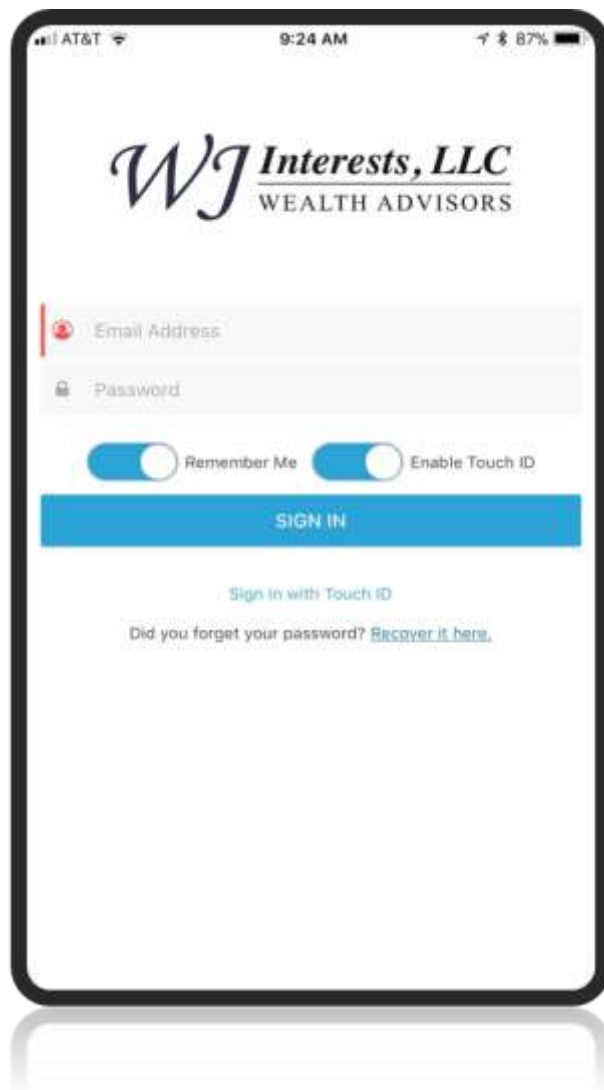
WJ CLIENT PORTAL APP WALKTHROUGH

The new WJ App has been redesigned and is now available from both Apple’s App Store and the Google Play Store on both your phone and tablets. To download, go to the App Store or Google Play Store and search “WJ Interests client portal” (this should autopopulate) and download the app as seen below.



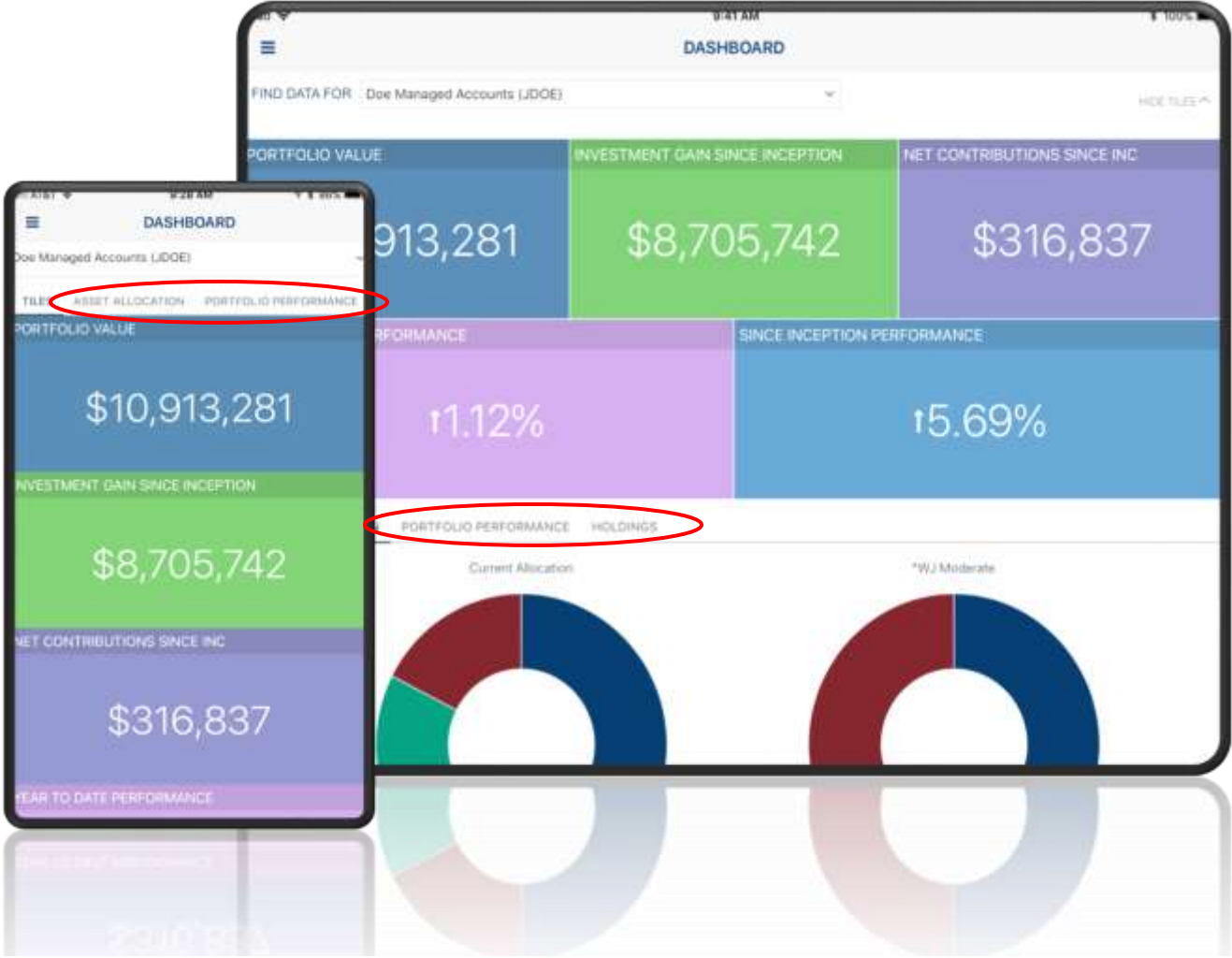
WJ CLIENT PORTAL APP WALKTHROUGH

Once the app is downloaded, open it and you will be taken to the log in page. Insert your credentials and also be sure to select the “Enable Touch ID” button if your phone has fingerprint capabilities. This will improve the security of your information and also allow faster log in.



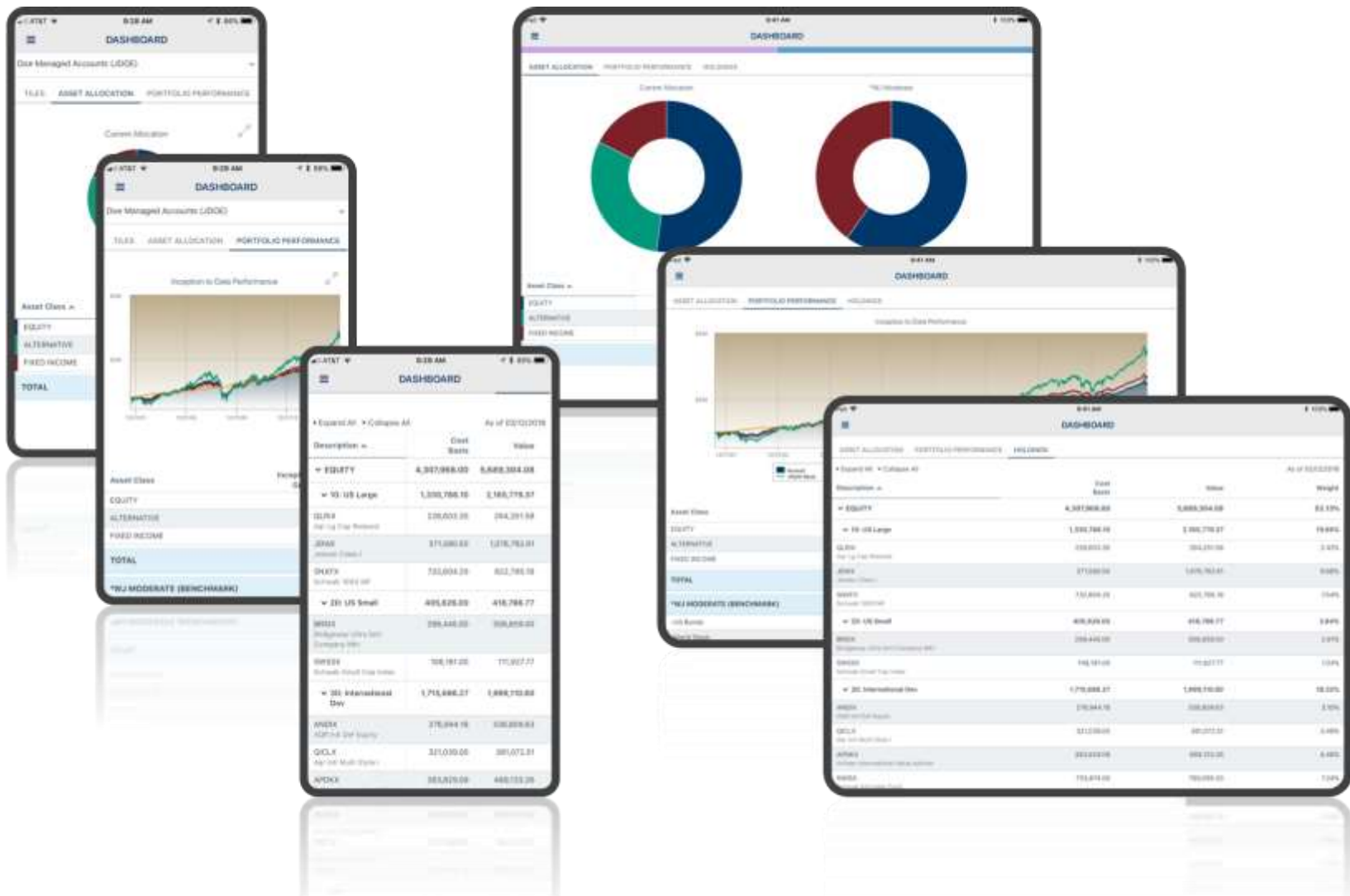
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Once you log in you will be taken to the Dashboard screen as shown below. The dashboard has been redesigned to mimic what you see on the desktop version. In addition to the main tiles that show the primary information, you will see tabs with additional reports as circled below:



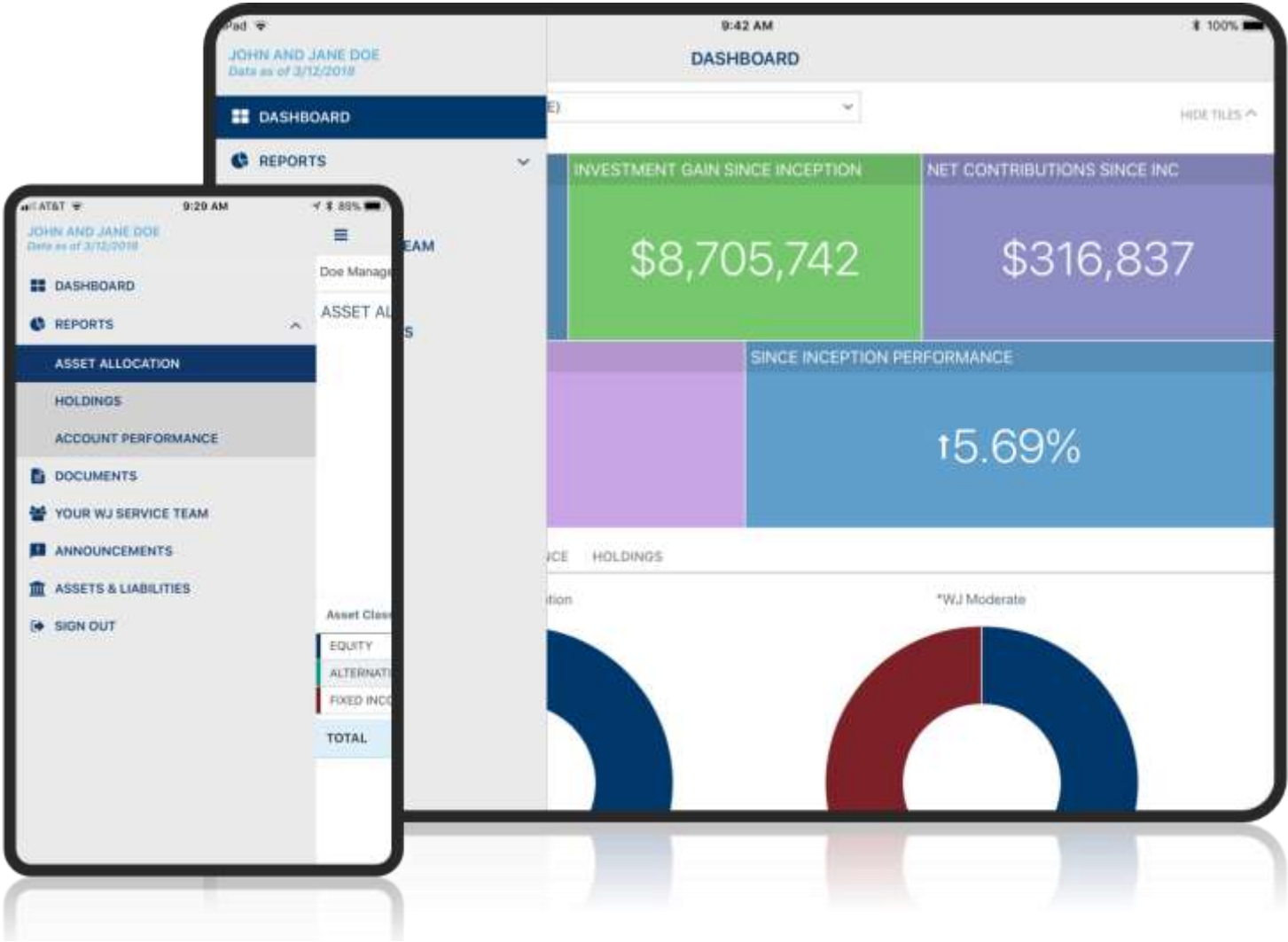
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You can click between these different tabs to show the various reports as below. These include an Asset Allocation report, Portfolio Performance report and a Holdings Report. The amount of reports available today is limited, and additional reports will be released in future versions.



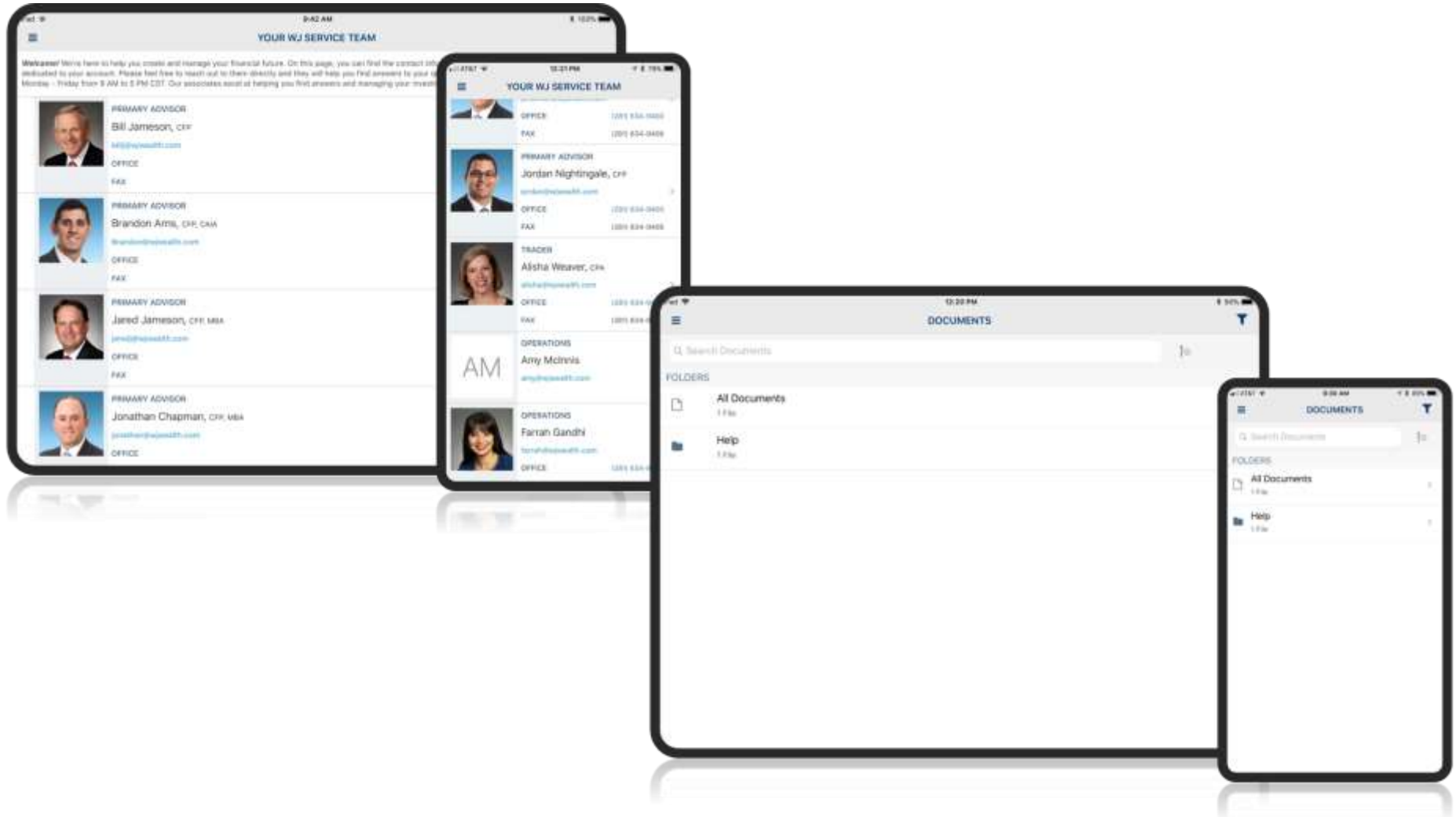
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The Button with the 3 Horizontal lines at the top left will open the menu where you can access individual reports, the Document Vault, your WJ Service Team, Announcements, and the Assets and Liabilities page.



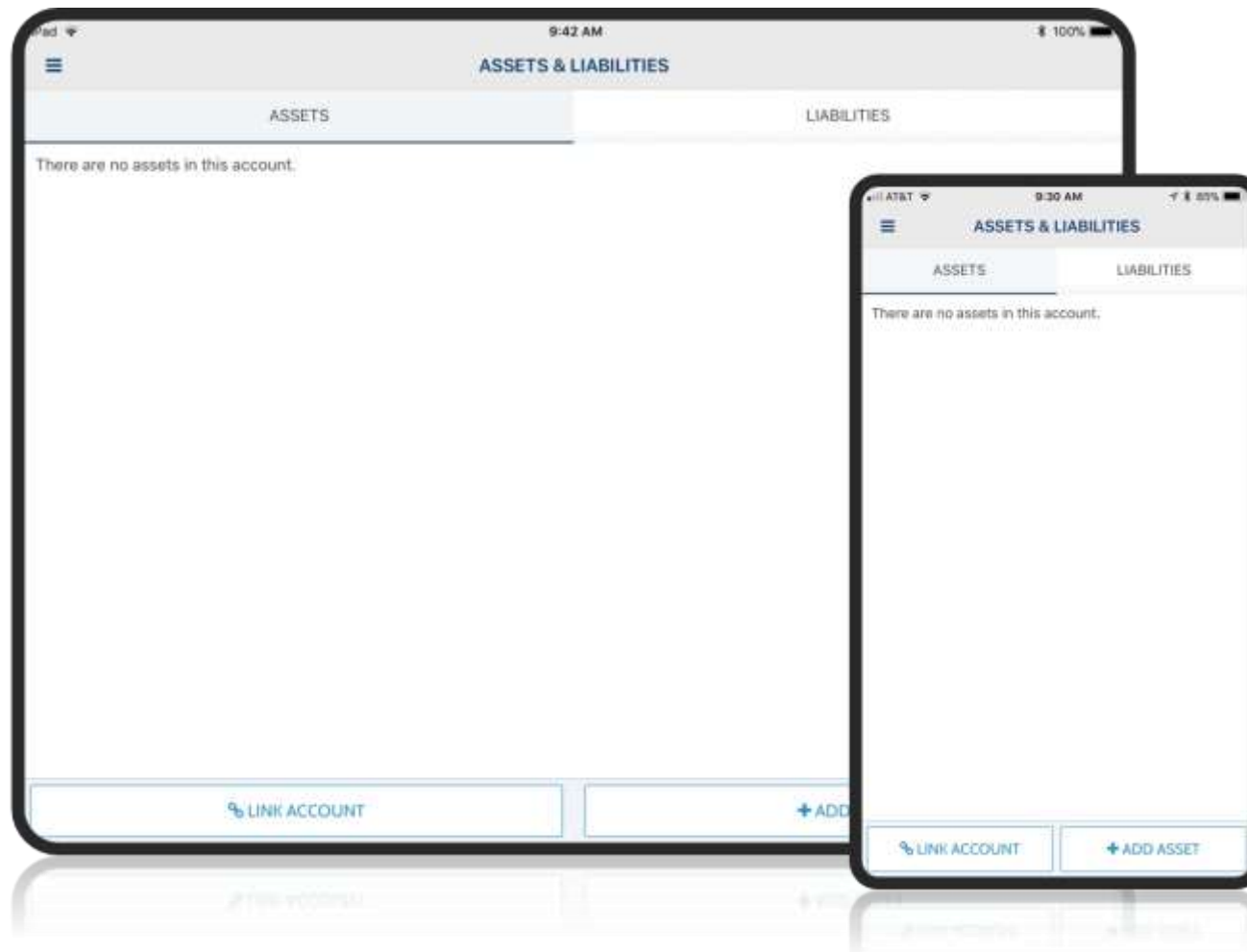
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Below is a screenshot of your WJ Service Team page and Document Vault. You are able to contact anyone at WJ through the app either by phone or email. The Document Vault is a secure cloud-based storage center for any important documents you'd like to store. We will also be posting various reports and other important documents in this vault.



WJ CLIENT PORTAL APP WALKTHROUGH

Finally there is the Assets and Liabilities section. This section will be used to link all of your assets and liabilities into an up-to-date net worth statement through our new Yodlee Integration. Adding your accounts is simple and is explained in greater detail in the “Yodlee Walkthrough”.



As said earlier, this is the first iteration of the new app and there will be more features added on in the future. If you have any questions about the app, please call WJ Interests at 281-634-9400 or shoot us an email.