

WJ CLIENT PORTAL YODLEE WALKTHROUGH

Recently, all WJ Client Portals have been updated with a service called Yodlee. Yodlee is an account aggregation service recently acquired by Envestnet, the company whose platform we use for your WJ Portal. With this update, you will now be able to see all of your assets and liabilities, updated in real time, on your WJ Portal. Having all of your financial account data in one place will make it much easier for you to have a clear view of your overall financial picture. It will also help WJ Interests produce better and more up to date financial plans. We ask that all clients please follow the instructions below to link your accounts in the portal.

First, log in to your WJ Portal [here](#). If you are having trouble remembering your password, or you have not logged in before, please click “Recover it here” as circled below.



WJ Interests, LLC
WEALTH ADVISORS

SIGN IN

Email:

Password:

Remember me on this computer

SIGN IN

Did you forget your password? [Recover it here.](#)

WJ CLIENT PORTAL YODLEE WALKTHROUGH

Once you have logged in, please move your cursor over to the far right and hover over your name, then click "Assets and Liabilites" as circled below:

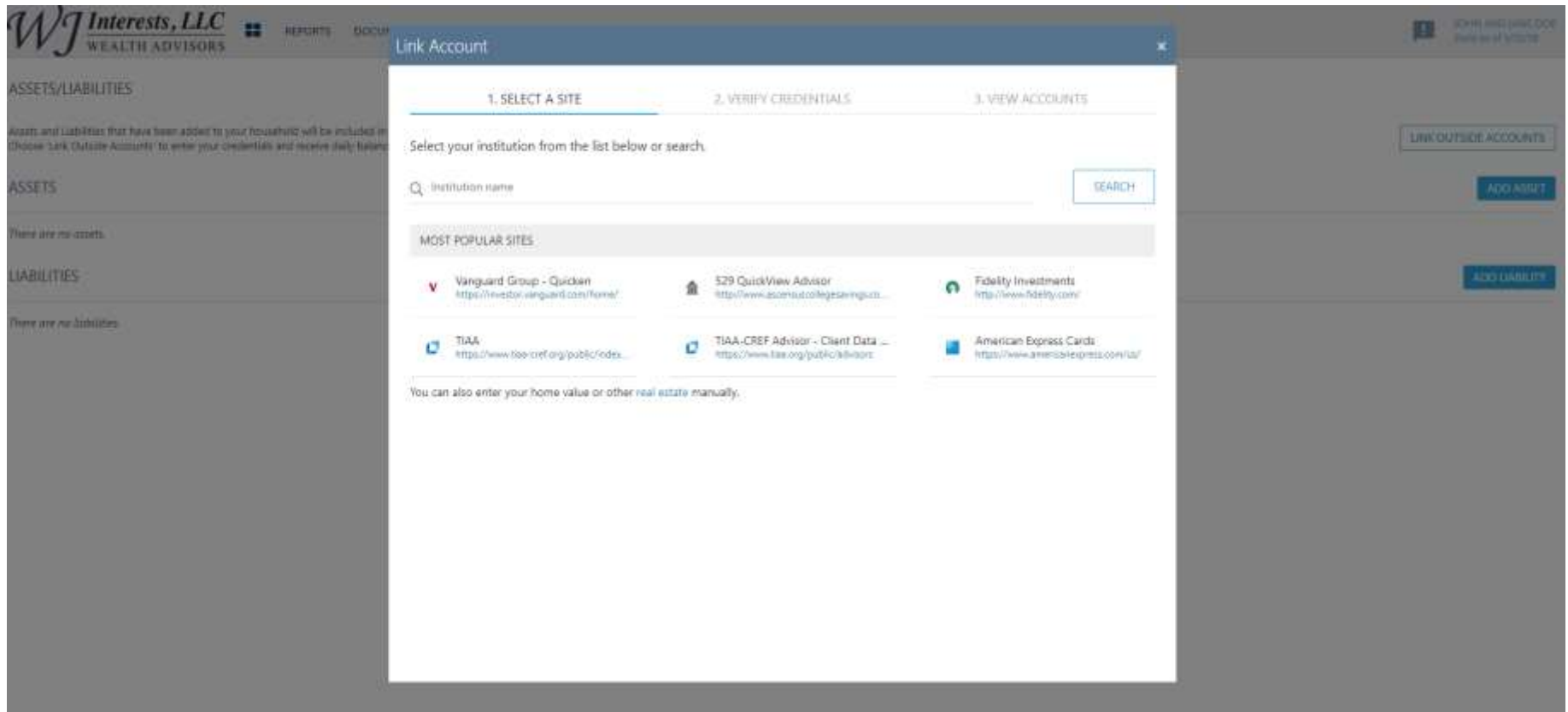
The screenshot displays the WJ Interests, LLC Wealth Advisors client portal. The top navigation bar includes 'REPORTS', 'DOCUMENTS', 'BILLING', and 'YOUR WJ SERVICE TEAM'. The user's name, 'JOHN AND JANE DOE', is circled in red in the top right corner, with a red arrow pointing to it. The main dashboard area shows the following data:

Metric	Value
PORTFOLIO VALUE	\$5,376,981
INVESTMENT GAIN SINCE INCEPTION	\$4,273,212
NET CONTRIBUTIONS SINCE INC	\$158,418
YEAR TO DATE PERFORMANCE	+0.36%
SINCE INCEPTION PERFORMANCE	+5.59%

Below the performance metrics, there are two donut charts comparing 'Current Allocation' and '*W) Moderate' allocations. The 'Current Allocation' chart shows a mix of dark blue, red, and green segments. The '*W) Moderate' chart shows a mix of dark blue and red segments. A navigation bar at the bottom includes 'ASSET ALLOCATION', 'ACCOUNT COMPARISON', 'PORTFOLIO PERFORMANCE', 'PERFORMANCE SUMMARY', 'CAPITAL FLOWS', 'RISK VS RETURN', 'HOLDINGS', and 'NET WORTH'. The 'ASSET ALLOCATION' section is currently selected, and an 'EXPORT DATA' button is visible on the right.

WJ CLIENT PORTAL YODLEE WALKTHROUGH

Once you click “Assets and Liabilities”, click the button “Link Outside Accounts” which will show a pop-up as below:



Type in the name of any financial institution with which you have an account. For example, if you have a checkings account at Wells Fargo, simply type “wells fargo” and select the appropriate result.

WJ CLIENT PORTAL YODLEE WALKTHROUGH

Once you click the appropriate result, you will be asked to enter your account credentials. Simply put in your user name and password and click "Submit". Wait for your accounts to be linked and then simply close the pop-up. You will now see those accounts added to your net worth. (Note: You may want to edit the account name manually after its on the assets/liabilities page if the system gives it an unintuitive name.)

LLC
VISORS

REPORTS DOCUMENTS

Link Account

1. SELECT A SITE 2. VERIFY CREDENTIALS 3. VIEW ACCOUNTS

Wells Fargo
www.wellsfargo.com

Please enter your Wells Fargo online account credentials.

Username

Password [SHOW](#)

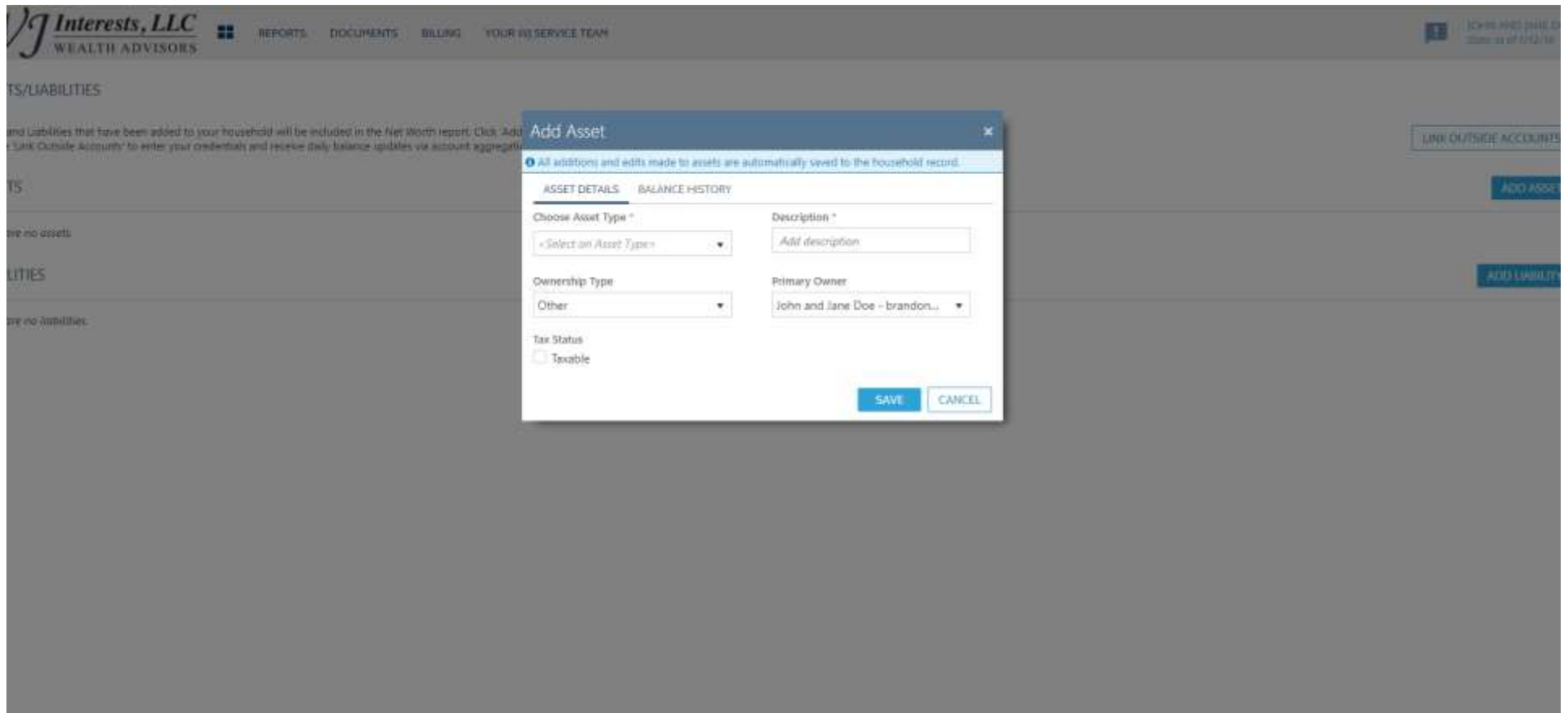
Re-enter Password

[← BACK](#) [SUBMIT →](#)

By providing your credentials, we verify in real time that you own the account you want to link. We then use this information to establish a secure connection with your financial institution.

WJ CLIENT PORTAL YODLEE WALKTHROUGH

If you want to add an asset or liability manually (without linking to a financial institution online), click the add asset or add liability option on the “Assets/Liabilities” page. There will be a pop-up as shown below:



The screenshot displays the 'Add Asset' pop-up form within the WJ Client Portal. The form is titled 'Add Asset' and includes a notification: 'All additions and edits made to assets are automatically saved to the household record.' The form is divided into two tabs: 'ASSET DETAILS' (selected) and 'BALANCE HISTORY'. The 'ASSET DETAILS' tab contains the following fields:

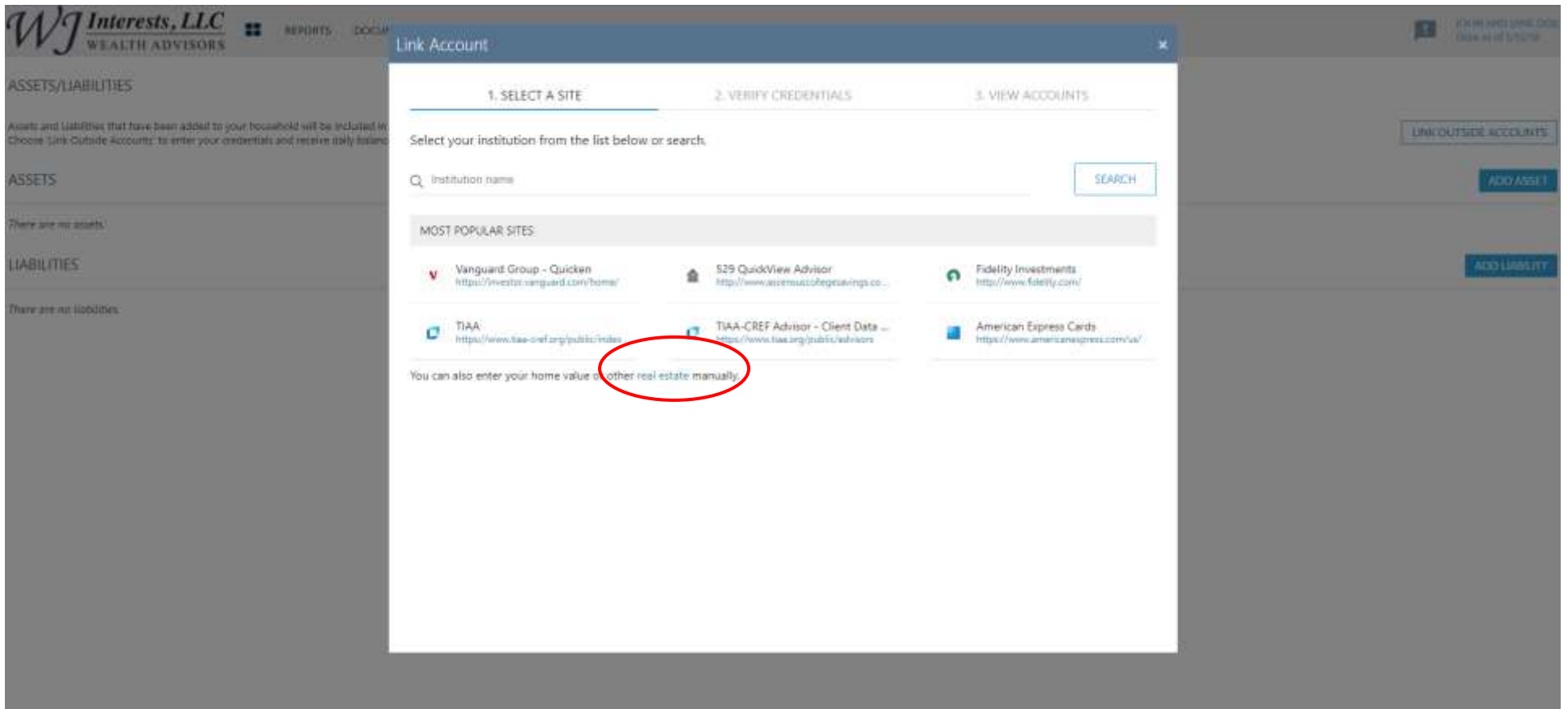
- Choose Asset Type ***: A dropdown menu with the placeholder text '<Select an Asset Type>'.
Description *: A text input field with the placeholder text 'Add description'.
- Ownership Type**: A dropdown menu with the selected option 'Other'.
Primary Owner: A dropdown menu with the selected option 'John and Jane Doe - brandon...'.
- Tax Status**: A checkbox labeled 'Taxable', which is currently unchecked.

At the bottom right of the form, there are two buttons: 'SAVE' and 'CANCEL'.

This section is perfect for personal property (excluding home), collectibles, outside private partnerships etc. Fill in the details and click save once you are finished.

WJ CLIENT PORTAL YODLEE WALKTHROUGH

For your house, click “Link Outside Accounts” as you did before. This time instead of typing in your financial institution, click the real estate link circled below:



WJ CLIENT PORTAL YODLEE WALKTHROUGH

Type in a name for the property, leave on “Calculate Automatically” (if you want the value to stay up to date), type in the address and click next. It will tell you the house has been successfully linked and you can close the pop-up.

Link Account

1. REAL ESTATE 2. MORTGAGE 3. VIEW ACCOUNTS

Account Name

Calculate Automatically
We will calculate using SmartZip*

Enter Value
Enter home value manually

Street Address

City and State or ZIP

BACK NEXT

smartzip * Home values provided by © SmartZip Analytics, Inc 2017.

Once you have all of your assets and liabilities linked, we will add a “Net Worth” report that will show your full financial picture updated daily. We think Yodlee will be a wonderful feature that will add simplicity to your financial life. If you need help with any step in the process, please call WJ Interests at 281-634-9400 or shoot us an email.