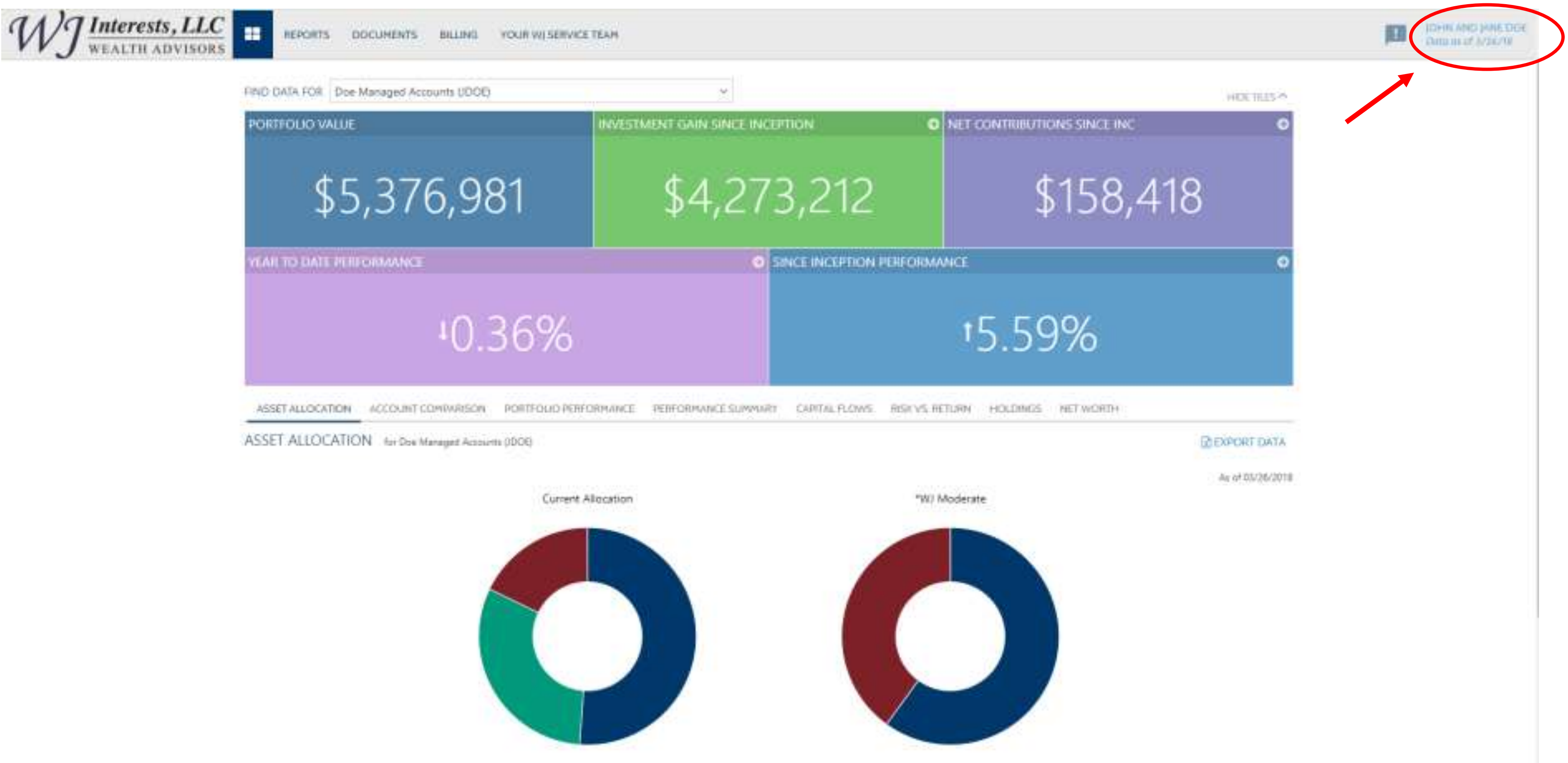
WJ CLIENT PORTAL YODLEE WALKTHROUGH

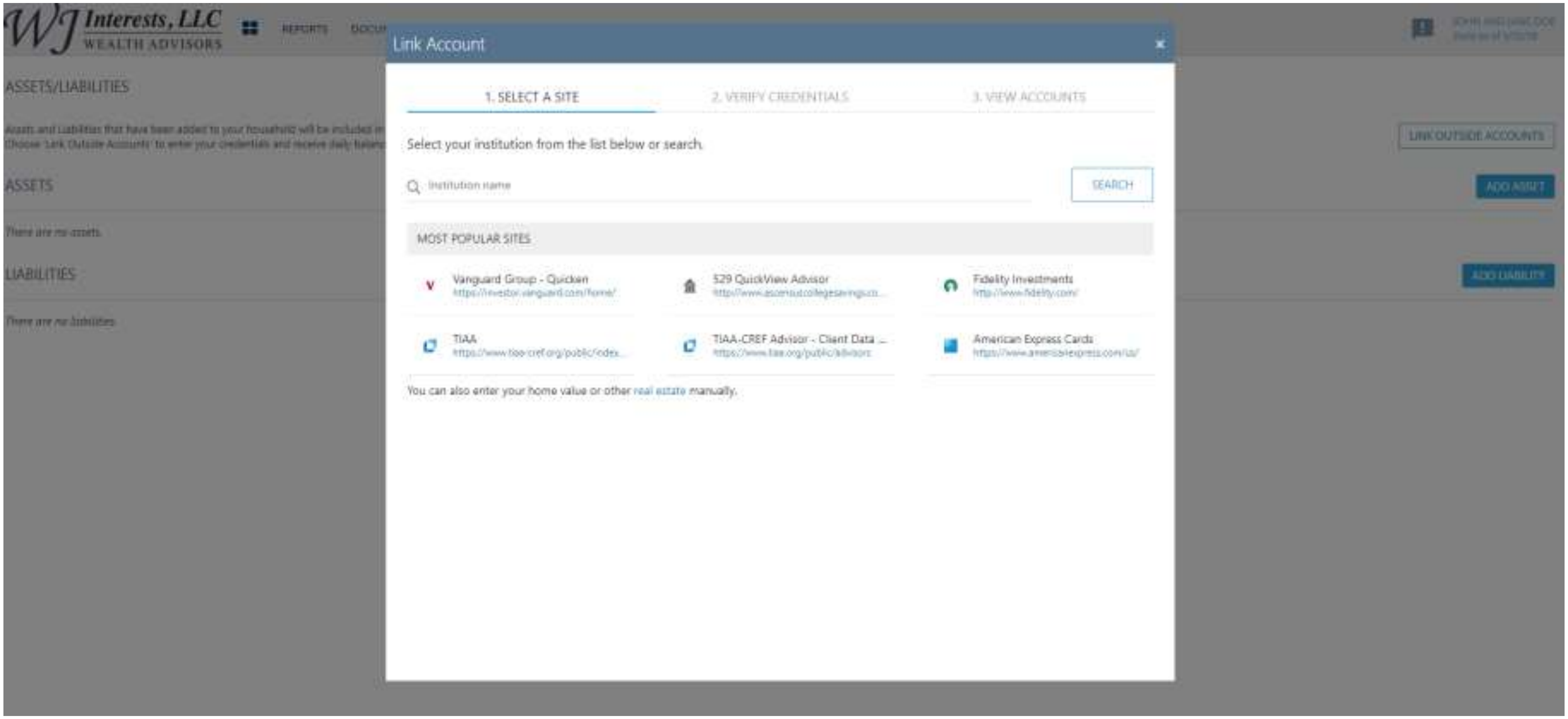
Recently, all WJ Client Portals have been updated with a service called Yodlee. Yodlee is an account aggregation service recently acquired by Envestnet, the company whose platform we use for your WJ Portal. With this update, you will now be able to see all of your assets and liabilities, updated in real 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.

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:



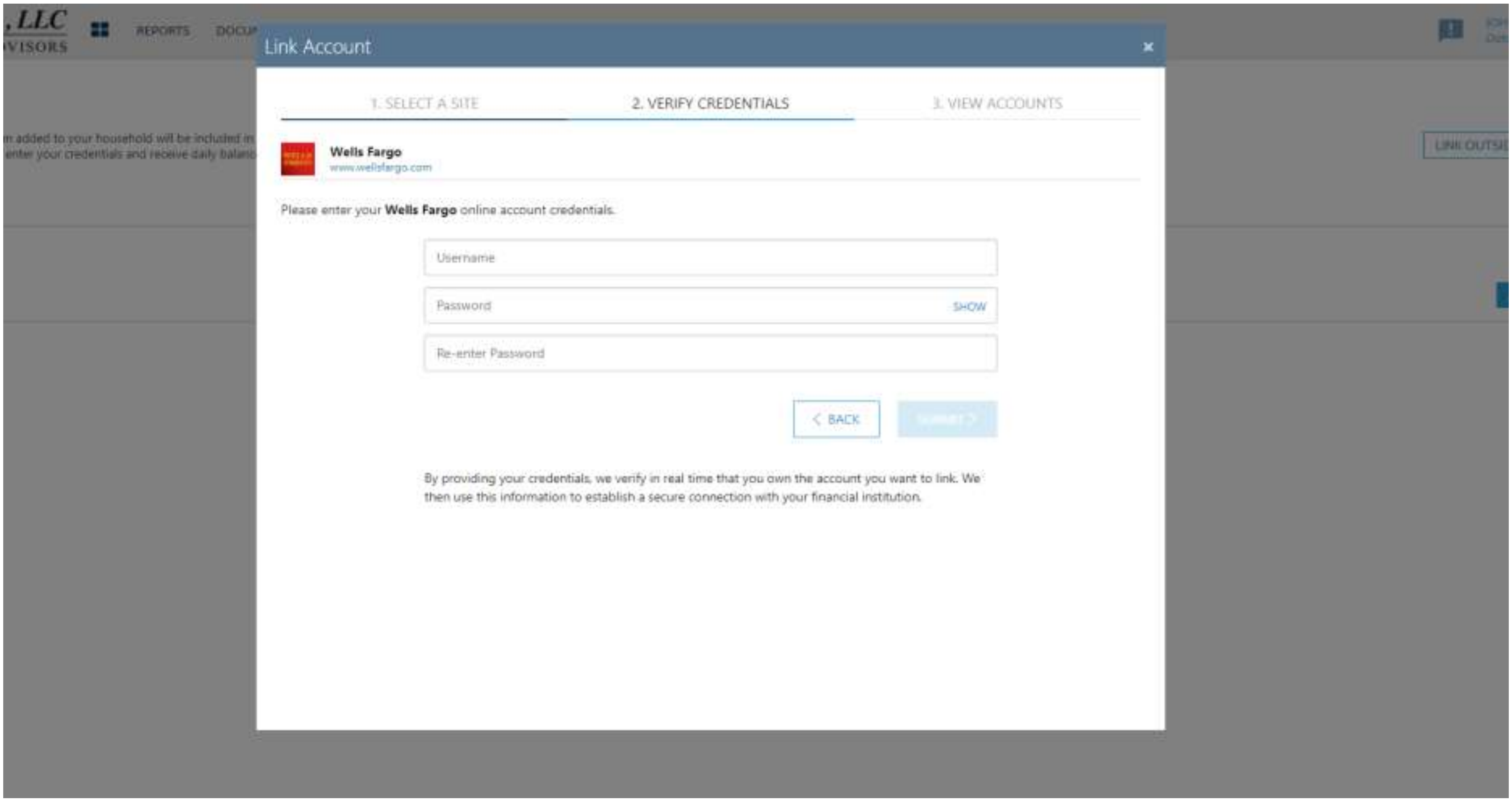
Once you click “Assets and Liabilities”, click the button “Link Outside Accounts” which will show a pop-up as below:



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.

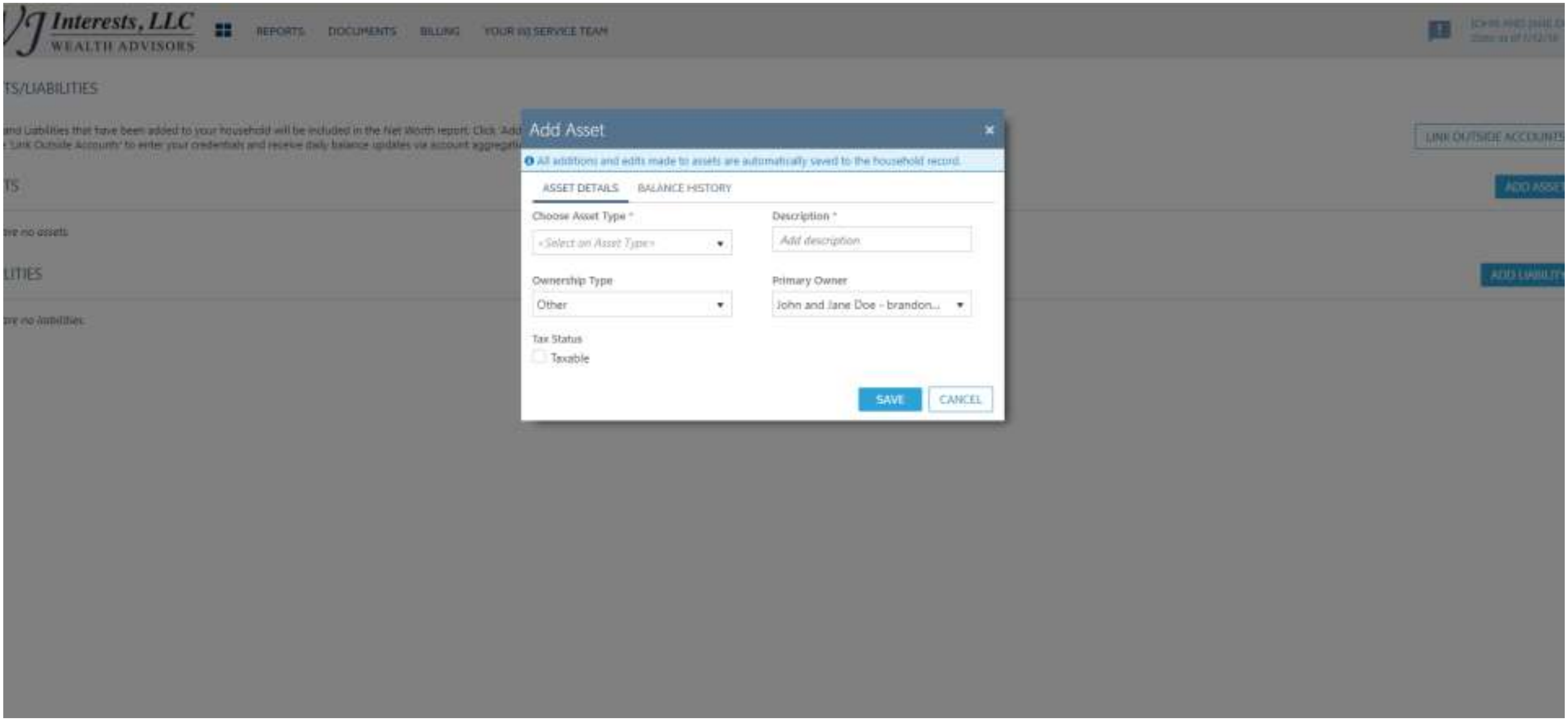
WJ CLIENT PORTAL YODLEE WALKTHROUGH

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.)



WJ CLIENT PORTAL YODLEE WALKTHROUGH

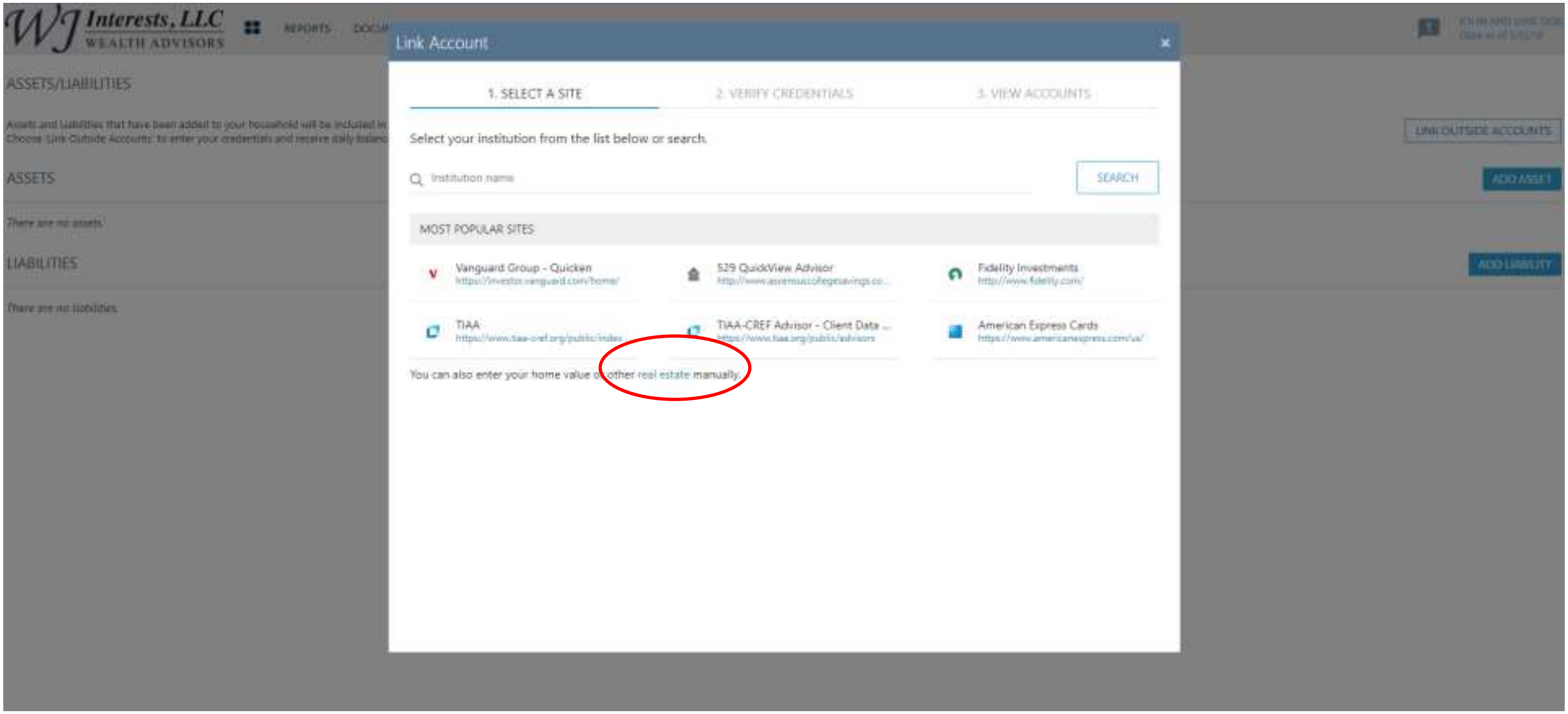
If you want to add an asset or liability manually (without linking to a financial institution online), click the add asset or add liability option on the "Assets/Liabilities" page. There will be a pop-up as shown below:



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.

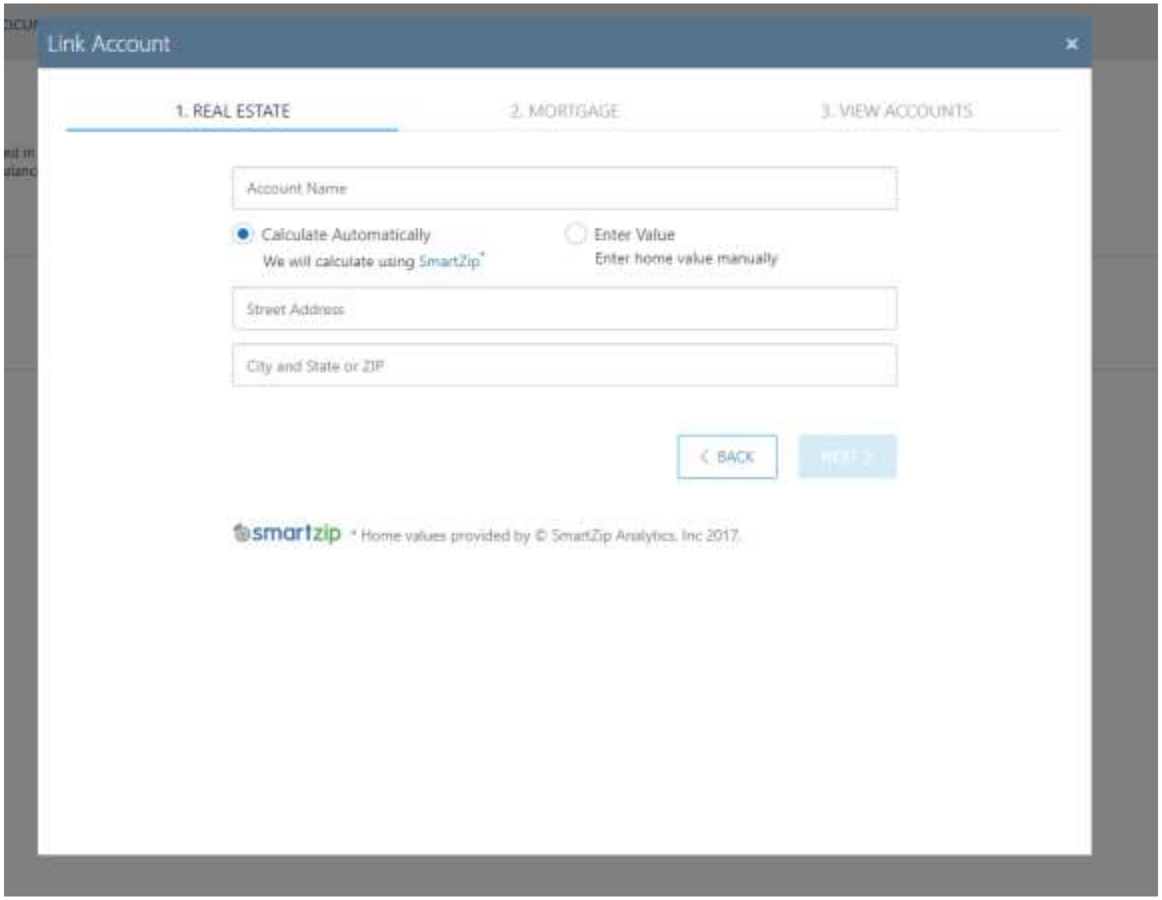
WJ CLIENT PORTAL YODLEE WALKTHROUGH

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.



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.