

# Step-by-Step Guide: Accessing & Downloading Your Quarterly Status Report

## Why would I use the Client Portal?

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- **Quarterly Status Reports:** You can access & download your Quarterly Status Reports so you can see how any changes you've requested and the latest market movements have impacted your Comfort Zone™ and performance. You will receive an email from me each quarter when a new one is posted.
- **Secure Document Sharing:** You can also use this portal to SECURELY send sensitive documents to your advisory team, like tax returns, social security statements, estate planning docs, non-JSWF financial statements, insurance information, etc.
- **Wealthcare Plan Archive:** SECURE way to access and store your Wealthcare Plans and Status Reports. This also allows you to come back and access your plans from any device, at any time.

## How do I get to the client portal?

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- Link on the JSW Financial website ([www.joelswilliams.com](http://www.joelswilliams.com)), under Client Access.
- Link in Welcome Email

## Step by Step Guide Covers

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- Accessing the Client Portal
- Viewing your quarterly status report online or printing
- Downloading your quarterly status report

## Before You Start

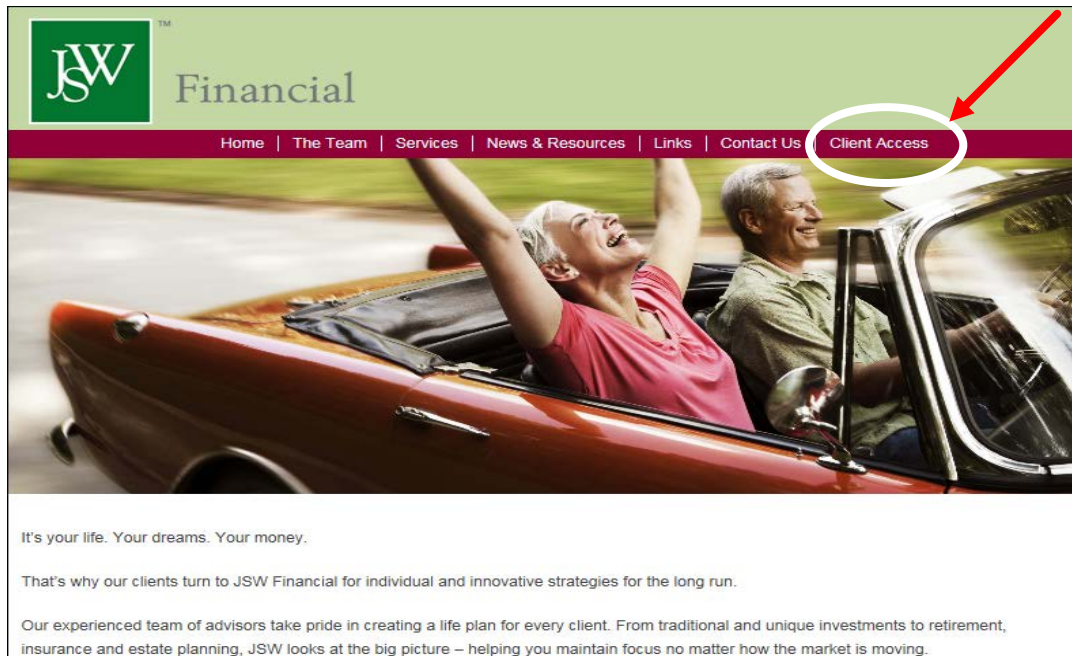
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- **Make sure you have your logon name.** Find email you received from Joel ([joelw@joelswilliams.com](mailto:joelw@joelswilliams.com)) with the subject "Welcome to the Wealthcare Capital Management Client Portal". This will contain your logon name and a link to setup your password. If you can't find this email, call the office and have the team resend one.
- **You have set your password up for the first time.** If you need help with this, please use the Step by Step Guide: Creating a password on the client portal, on our website.

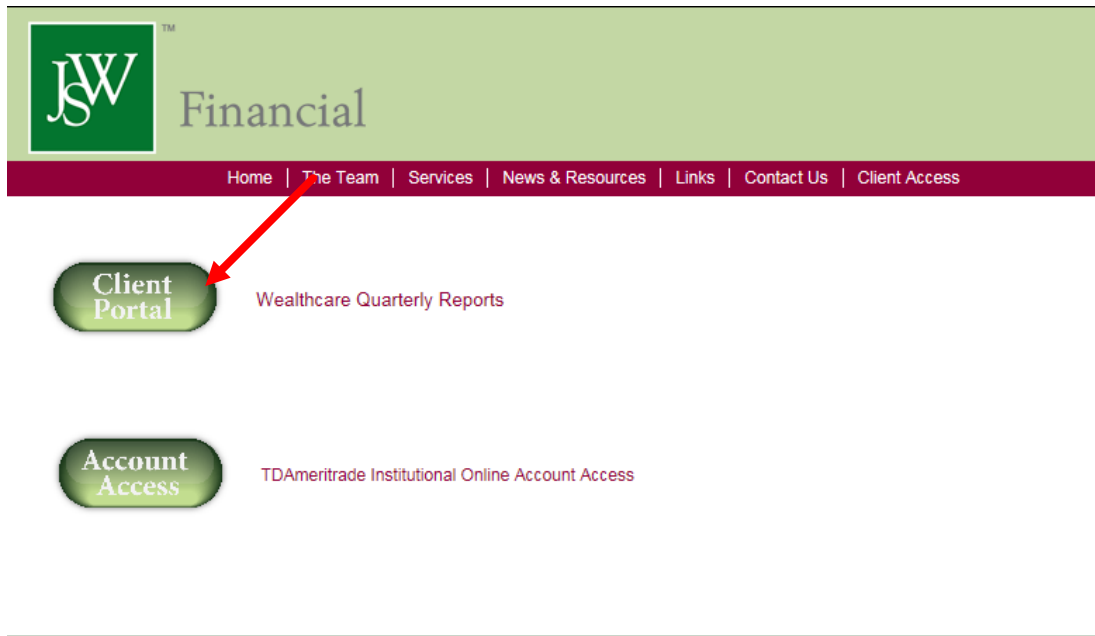
## Accessing the Client Portal: Wealthcare Plans


1. You can access the Client Portal right from the JSW Financial webpage: [www.joelswilliams.com](http://www.joelswilliams.com).

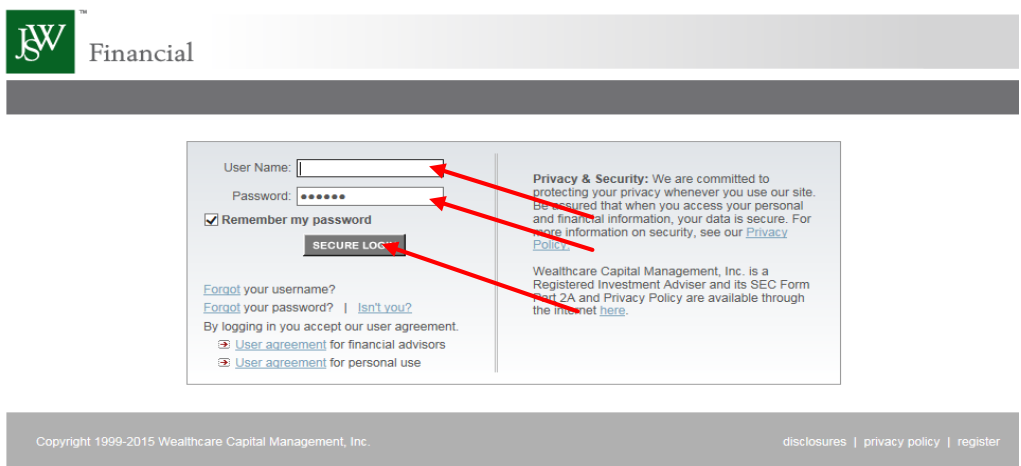
Click the **Client Access** tab on the menu bar at the top



2. Click the **Client Portal** button to access.



3. You will be taken to a new website (see below). Enter your username (from welcome email) and password. Click  password. Click

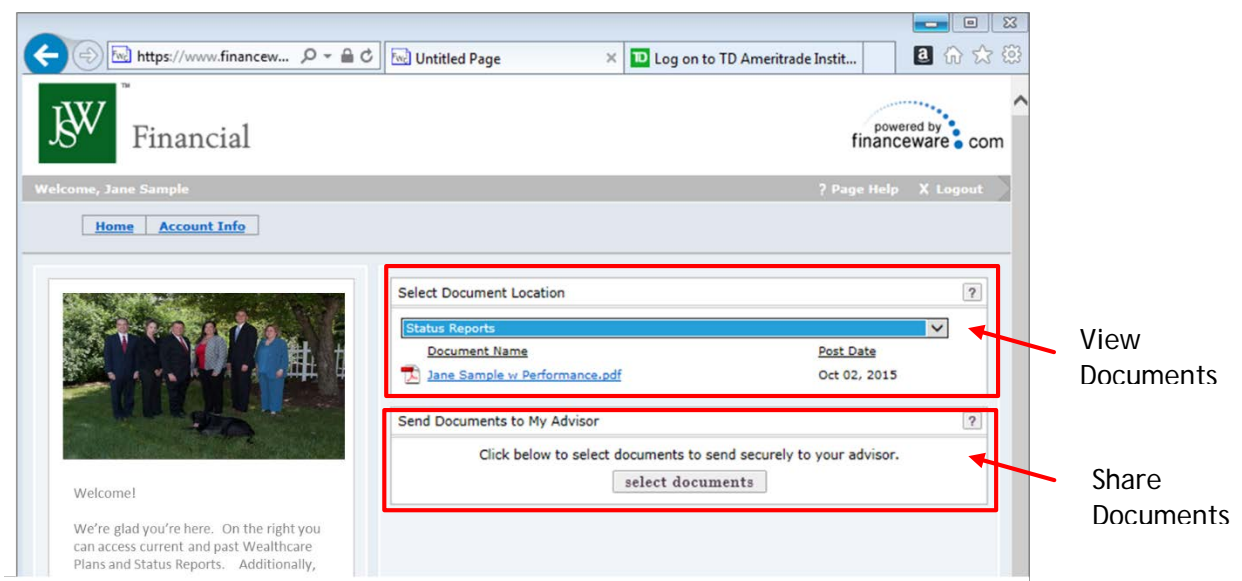


4. You are now in the client portal. (see picture below)

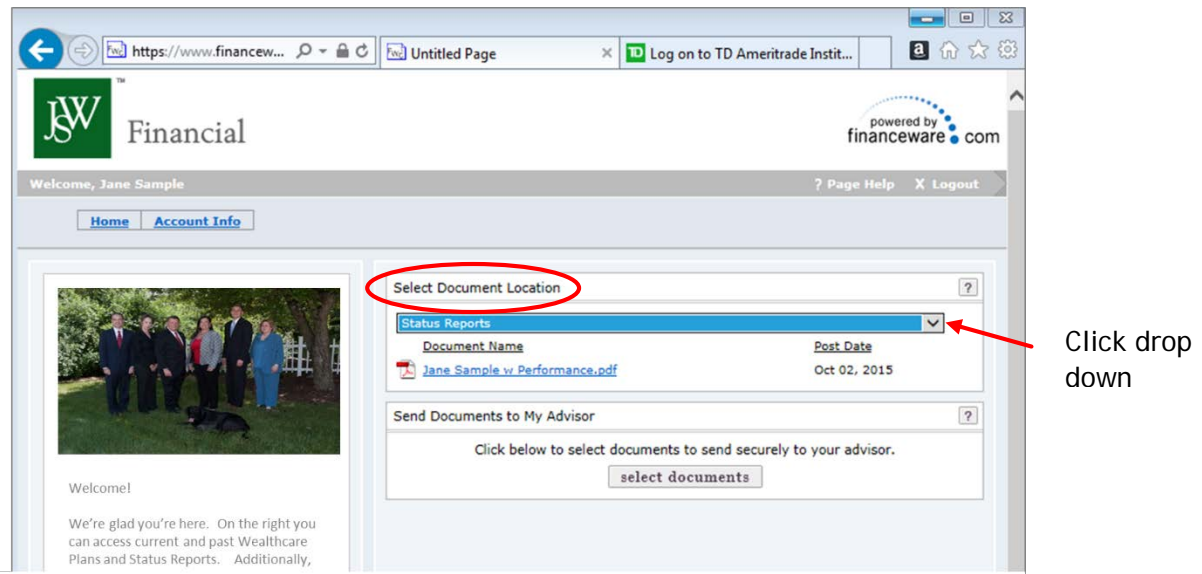
Welcome! From here you can securely share documents with us, access your current Wealthcare Plan of Record and access your quarterly status reports. This portal is also great place for archiving your past reports, as you can come back any time and from any device as long as you have your logon name and password. For added security, all of the information you store here is kept on Wealthcare’s servers encrypted and protected behind their firewall, not in the cloud.”

There are two primary functions available for you in this portal

- Viewing Documents
- Securely sharing documents with your advisor.

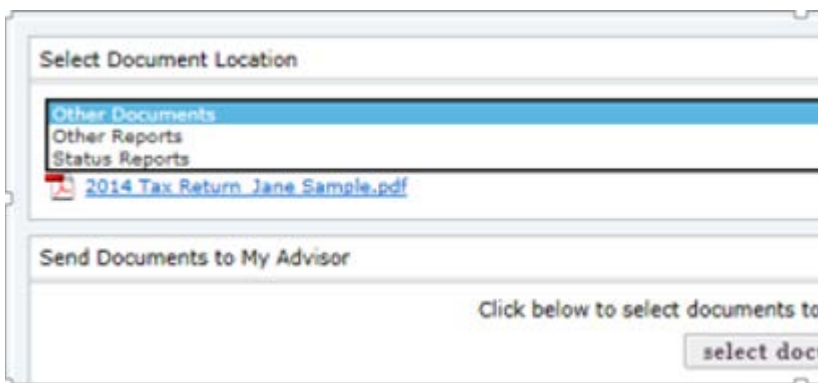


5. To view your Status Report, click the drop down arrow in the upper right hand side box, labeled 'Select Document Location'.

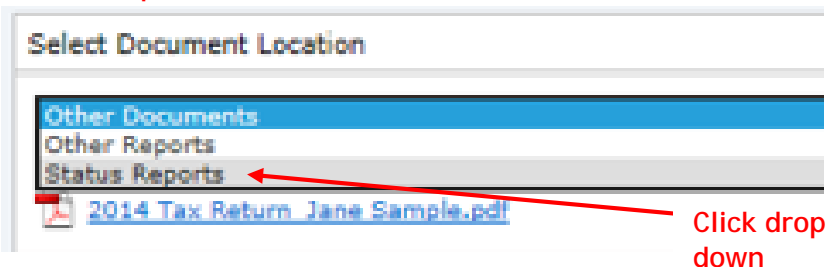


In the drop down you will see 3 types of documents to view:

- Other Documents - Includes any documents you have uploaded for us
- Other Reports - Includes your current & past WC plans
- Status Reports - Includes your current & past status reports

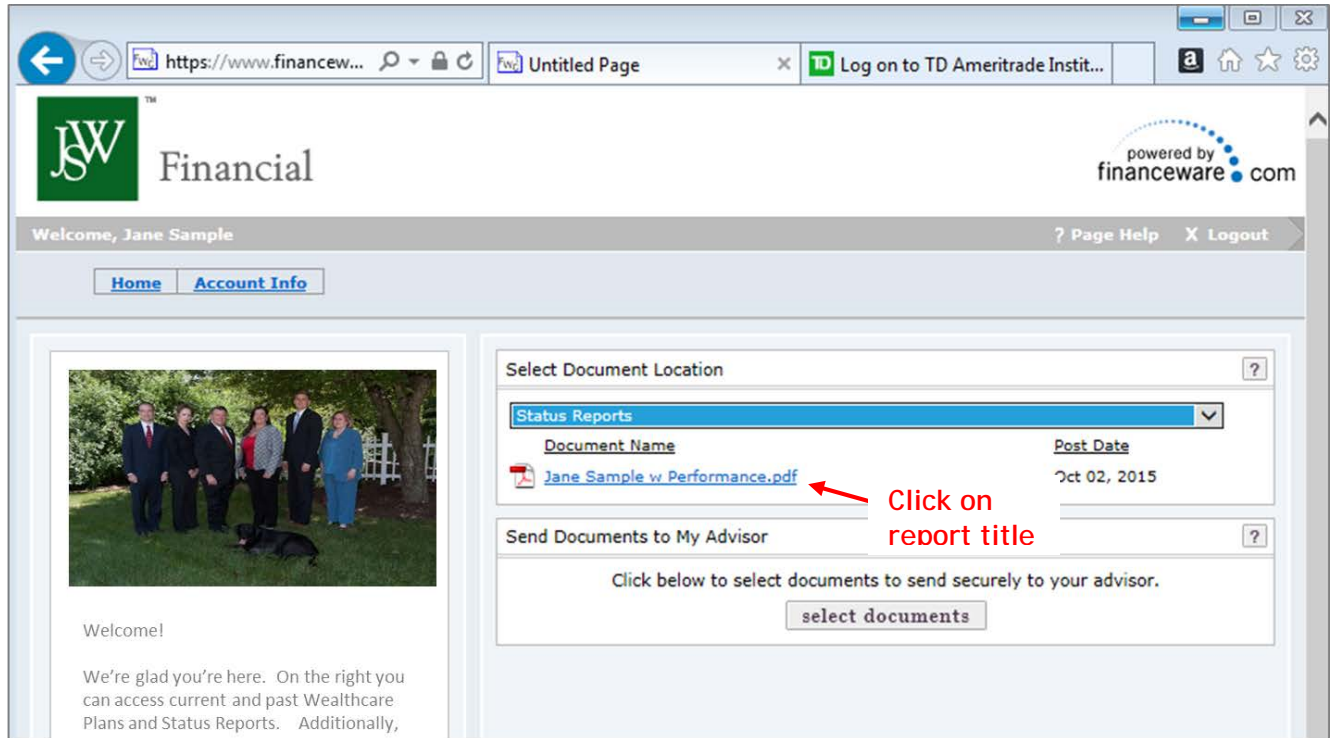


6. Select **Status Reports**




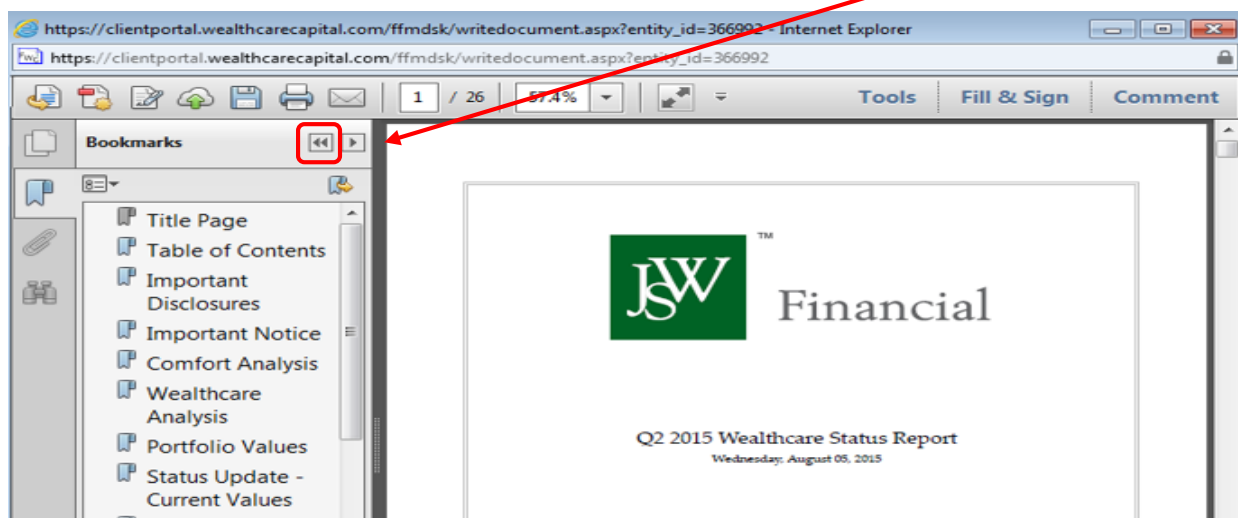
7. Your status reports will be listed in the upper box, below the dropdown menu. All status reports are archived and accessible, so you will see list of past quarter reports in your portal as time goes on.

Click on the blue report title for the report you would like to view



8. A new window will open, displaying your report.

NOTE: To hide the table of contents in your view screen, Click the  button.



9. You can now view your report, download or print it using the navigation buttons in your browser window. Highlighted in the picture below.

NOTE: Keep in mind that your report will stay safely archived in your portal so you can come back and access again at a later time.

