HT|TC WEALTH PARTNERS
A HIGHTOWER COMPANY

# CLIENT USER GUIDE

## Well-th View and the Well-th Vault


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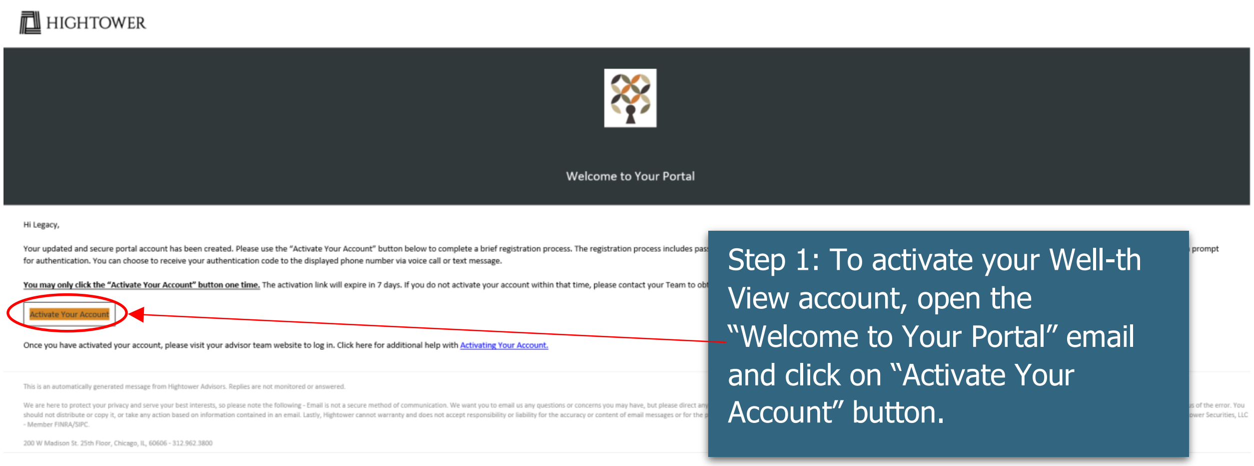
# I. How to Use Well-th View and the Well-th Vault.

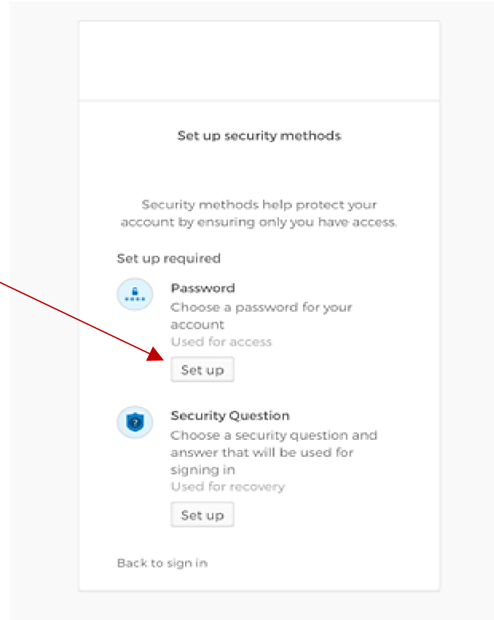
Well-th View allows you access to all advisor-recommended portals. To use Well-th View, cookies must be enabled in your browser; see the appendix for how-to's.

## A. Initial Activation and registration.

When your advisor provides you access to Well-th View, you will receive an email from Hightower Advisors.  Click on the "Activate Your Account" button.



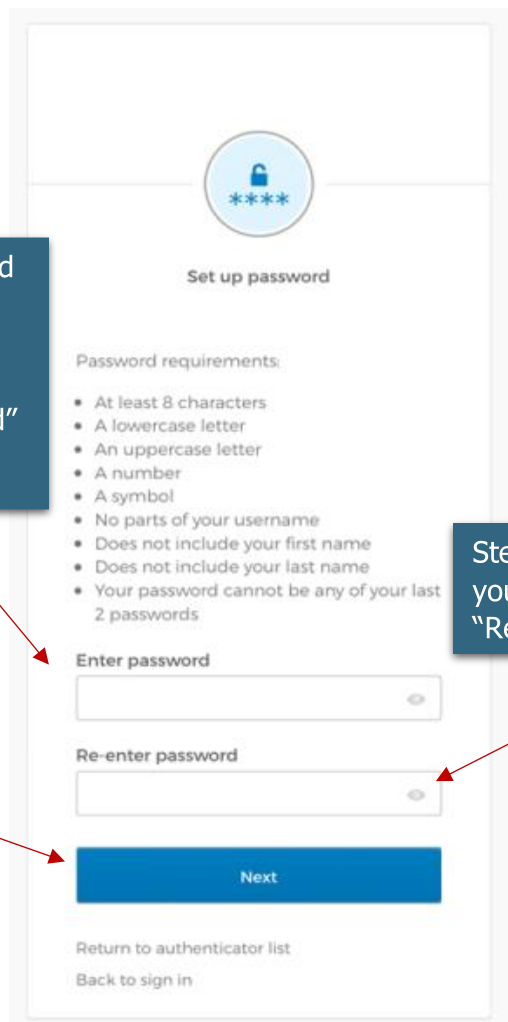
Step 2: to choose a password click this "Set up" box.



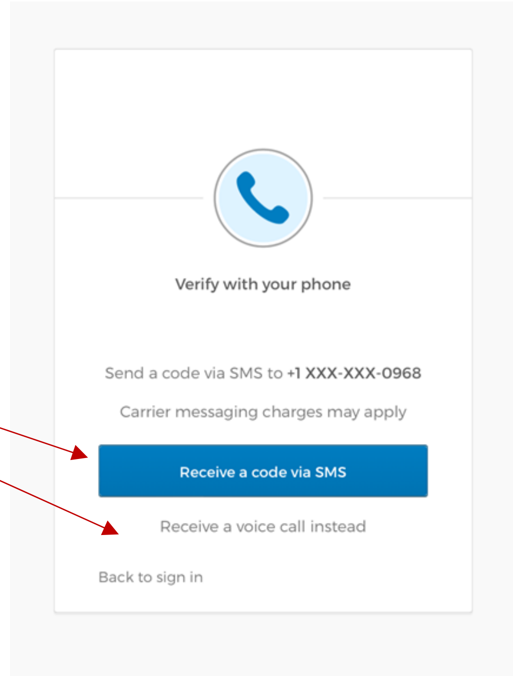

Step 3: choose a password and enter it here (NOTE: your password must meet the requirement outlined above the "Enter password" box.

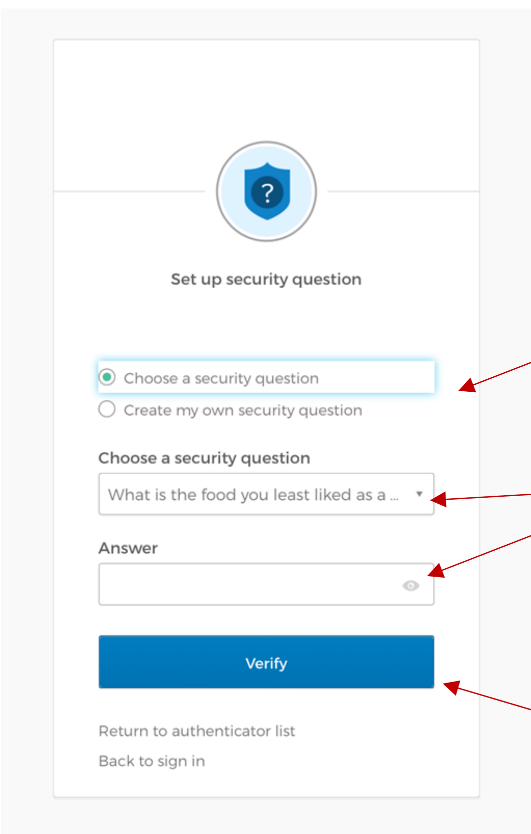
Step 4: enter the password you chose again in the "Repeat password" box.

Step 5: click "Next"



Step 6: Select whether you'd like to receive an authentication code via SMS text or via phone call here.



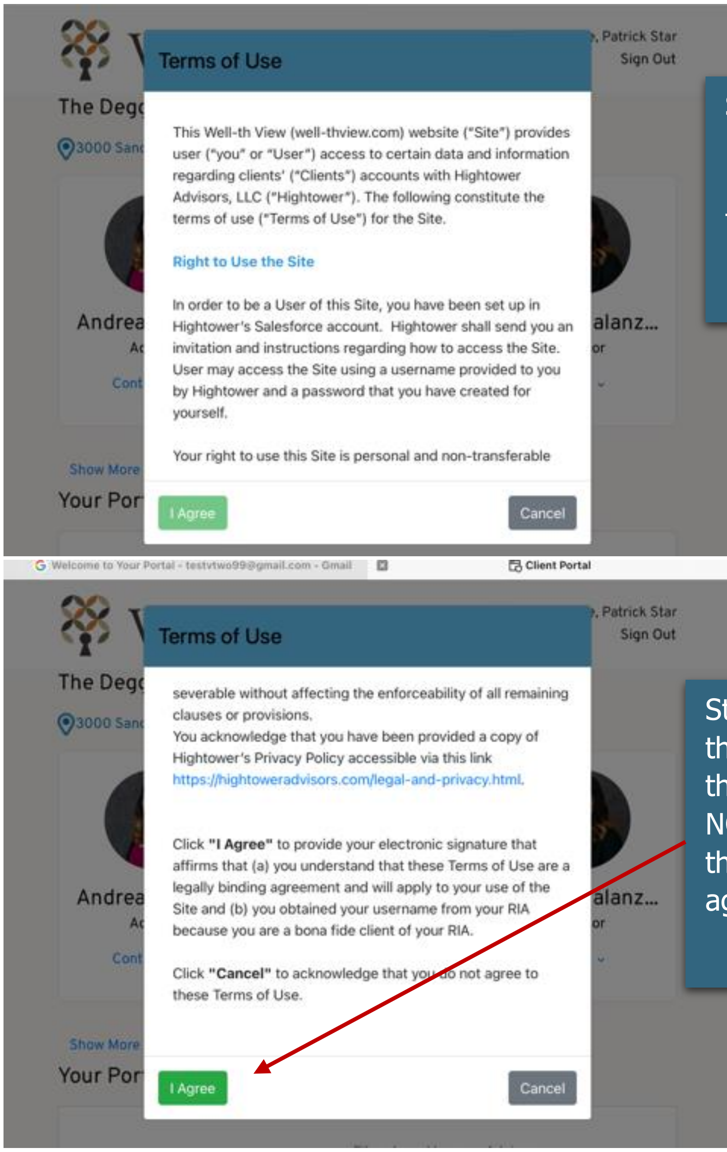




Step 7: Select whether you'd like to chose a security question from the drop down list or create your own question.

Step 8: Select a security question from the drop down list and then enter an answer to the question in the "Answer" box.

Step 9: Click "Verify".

On the first login attempt and periodically thereafter, you must acknowledge the “Terms of Use”.

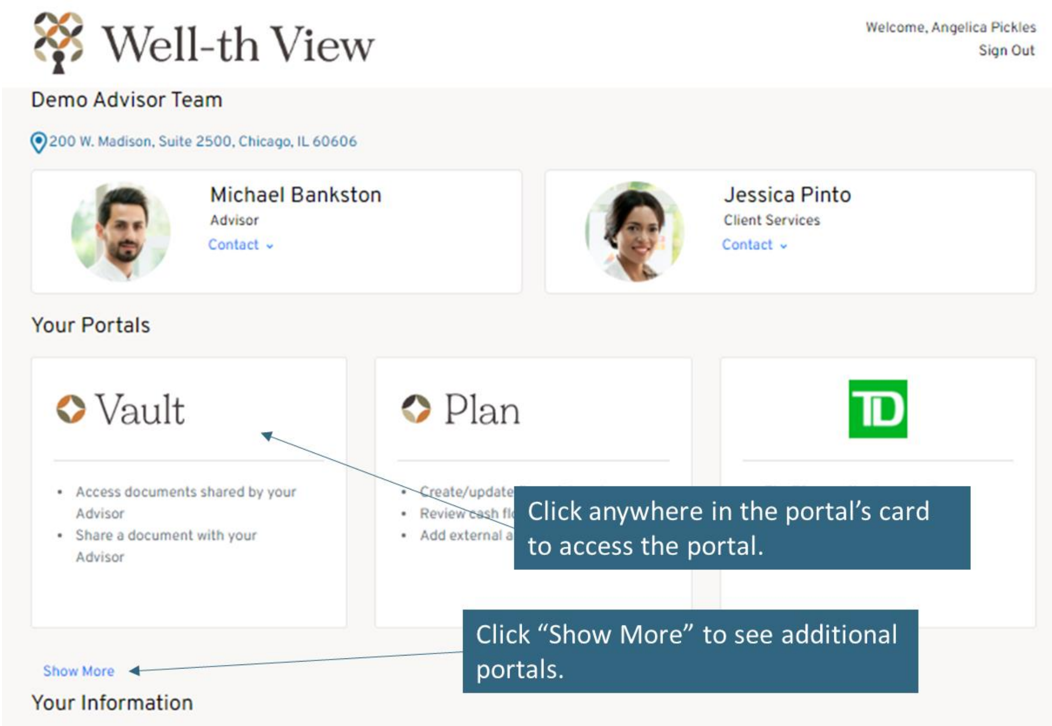



Step 1: read the verbiage pressing the down arrow until you reach the end of the Terms of Use.

Step 2: if you agree with the Terms of Use, click on the “I Agree” button. NOTE: you may not use the portal unless you agree with these Terms.

Next, you will see the Well-th View home page with your advisor's information and access to portals.

If you have access to multiple portals, simply click on the name of the portal you'd like to access.




## B. How to Access the Well-th Vault.

NOTE: if you are using Safari on an iPad, please change the page zoom setting to 85% for the best experience (go to Settings>Safari>Page Zoom- set to 85%).

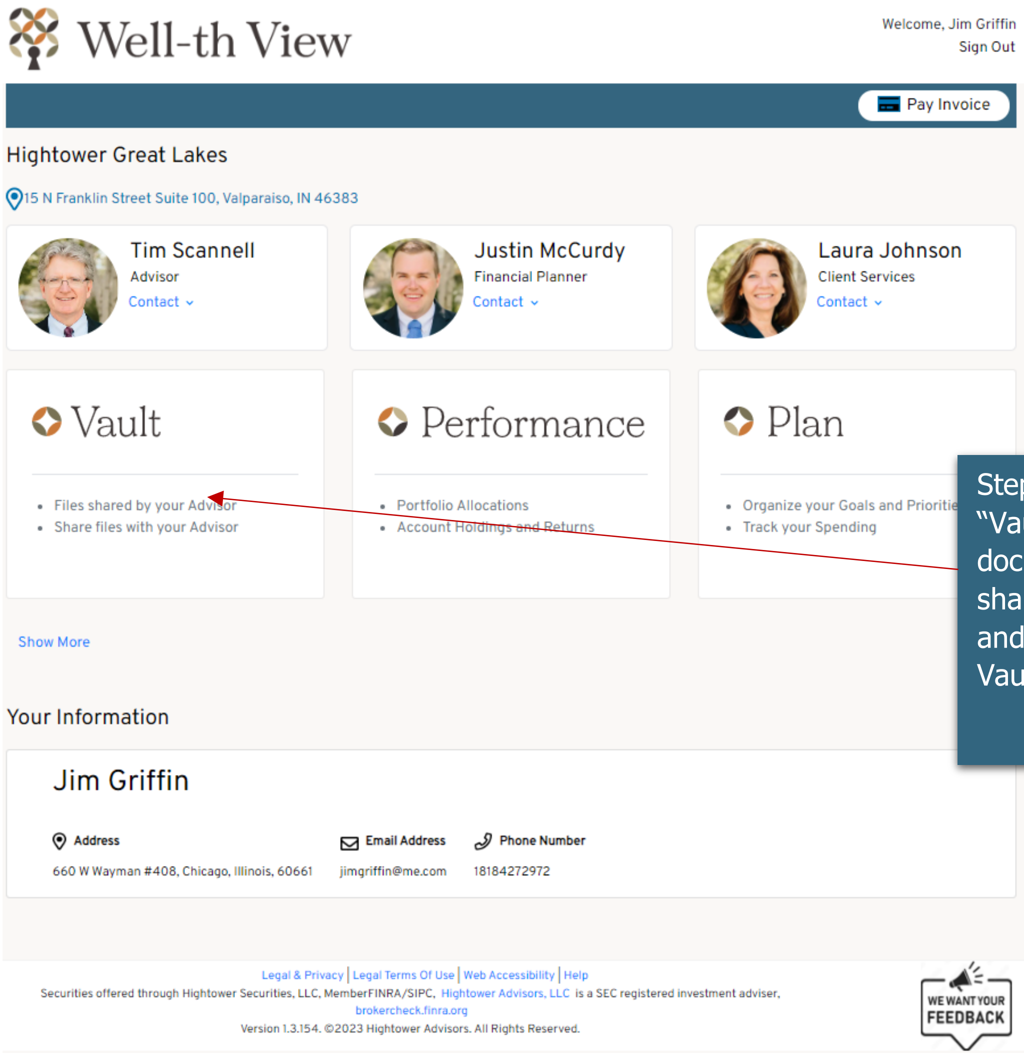
The Well-th Vault allows you to:

- View and collaborate with your Advisor on documents.
- Upload documents for your Advisor team.
- View documents and statements from the Black Diamond Performance system.

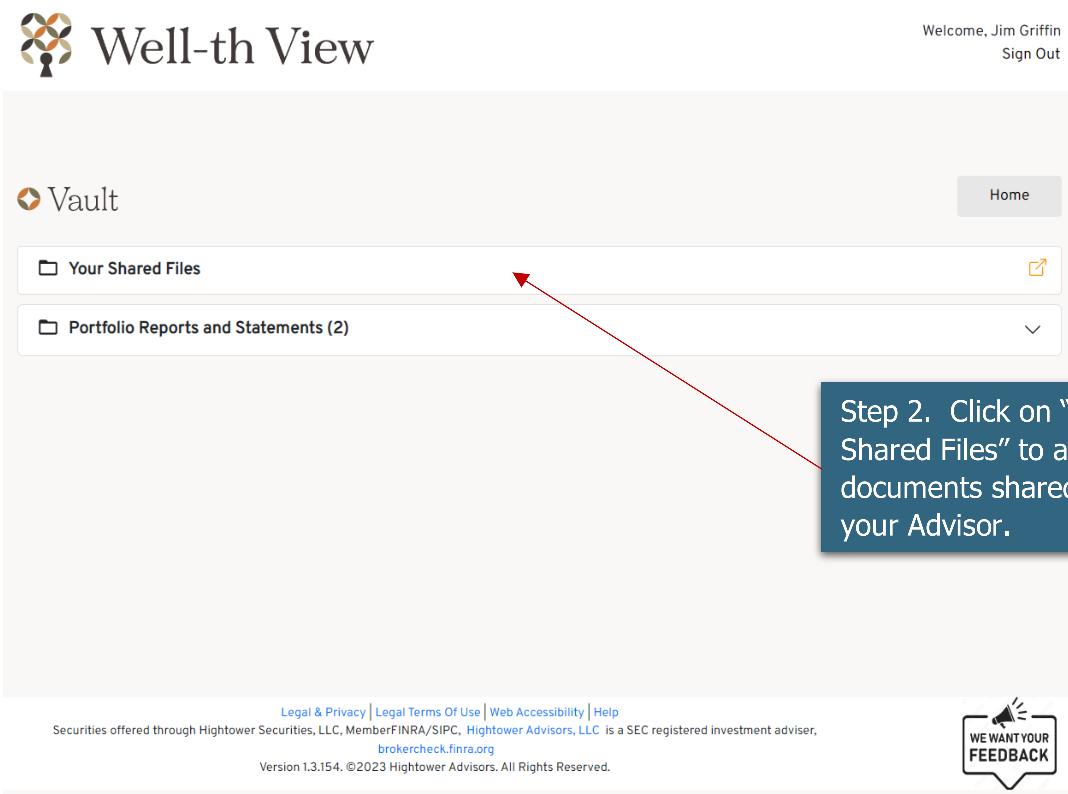
There are multiple ways to access the Vault after the registration has been completed:

1. Type the URL in browser for the portal landing page: https://well-thview.com. Enter credentials; the Well-th View home page is displayed. Click on the Vault portal.
2. Go to your advisor's website and click on the "Access your Account" button.
3. Use the Box mobile app. If using a mobile device with the Box mobile app installed, activate the Box app and enter credentials directly.

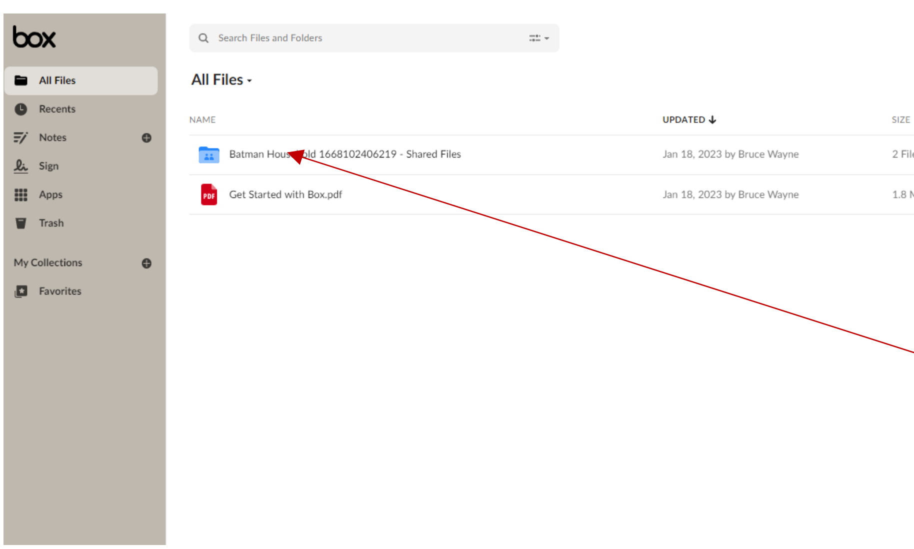
## C. Access documents shared by your Advisor and placed in the Well-th Vault




Step 1. Click on the "Vault" tile to access documents and/or reports shared by your Advisor and uploaded to Well-th Vault



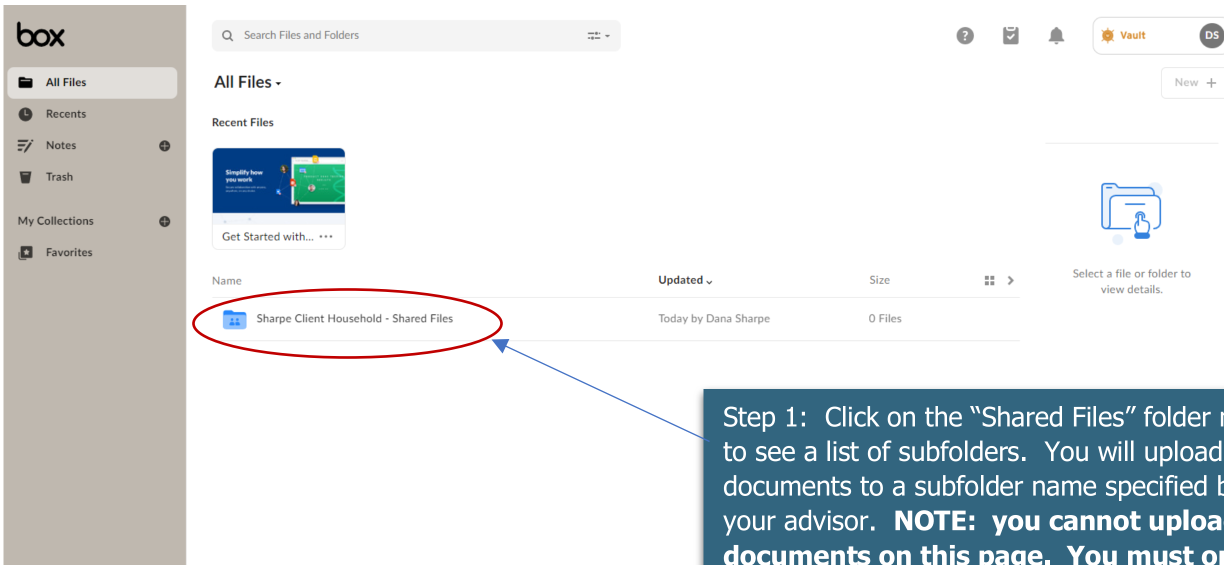

Step 2. Click on "Your Shared Files" to access documents shared by your Advisor.



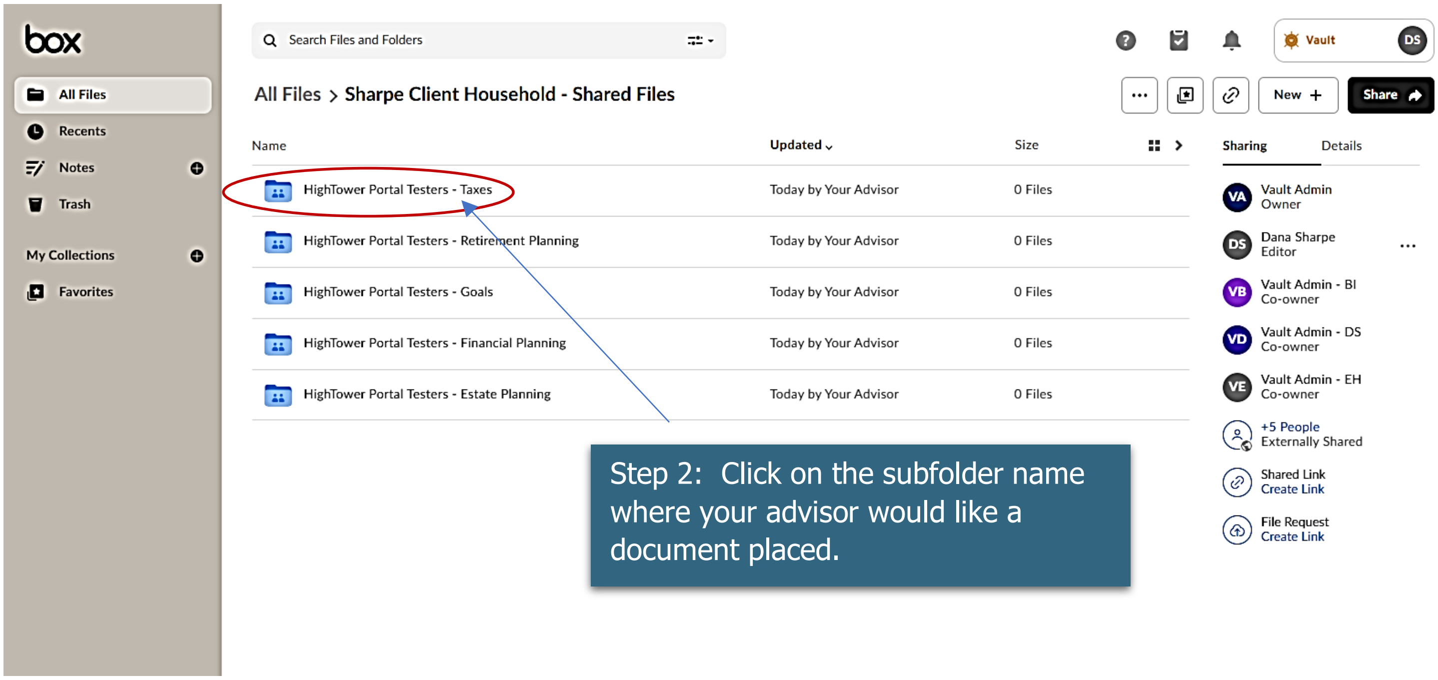

Step 3. Click on the top blue folder to access documents shared by your Advisor.

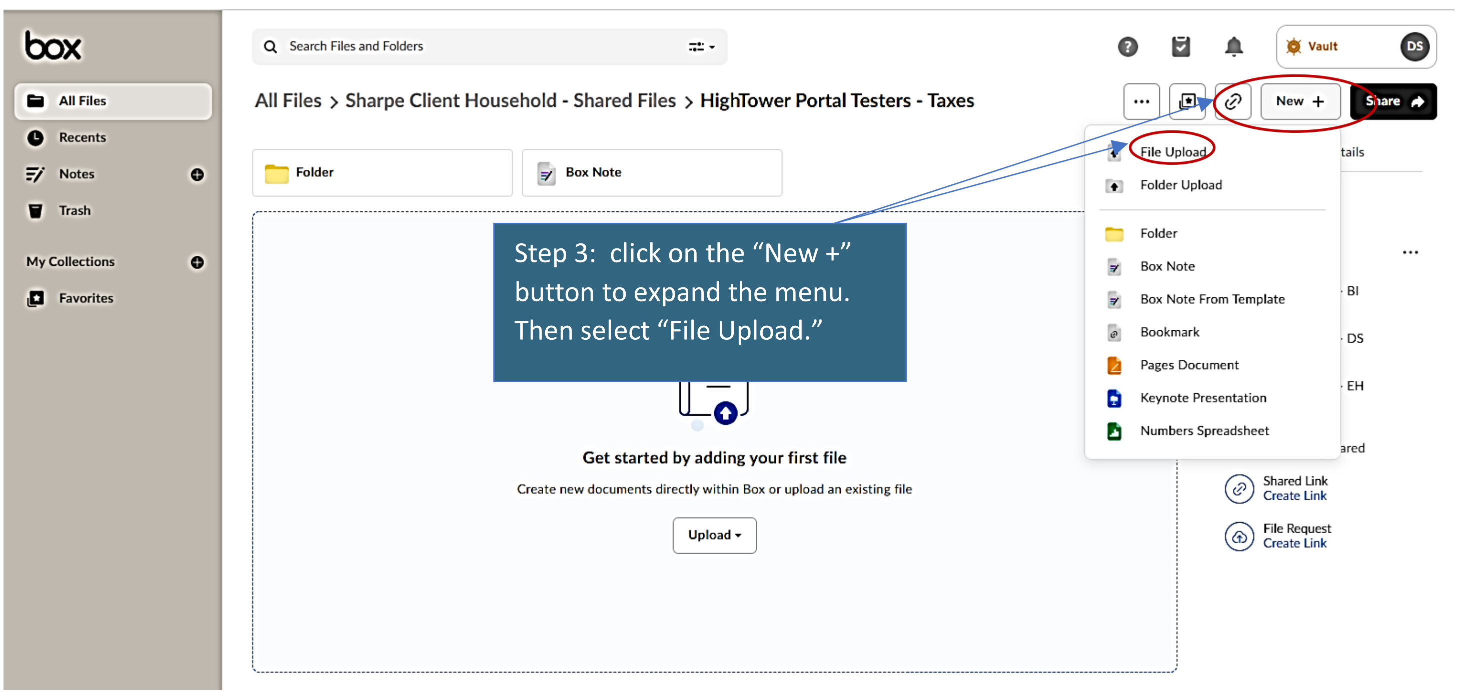
## D. Share a document with your Advisor.

Access the Well-th Vault as described above.  Box is the vendor we have chosen to use for secure document storage.  Your home vault page should look something like this.




Step 1:  Click on the "Shared Files" folder name to see a list of subfolders.  You will upload documents to a subfolder name specified by your advisor.  **NOTE:  you cannot upload documents on this page.  You must open the blue folder in order to upload a document for your advisor.**


box
All Files
Recents
Notes
Trash
My Collections
Favorites
Search Files and Folders
Vault
All Files > Sharpe Client Household - Shared Files
New +
Share
Name
Updated
Size
Sharing
Details
HighTower Portal Testers - Taxes
Today by Your Advisor
0 Files
HighTower Portal Testers - Retirement Planning
HighTower Portal Testers - Goals
HighTower Portal Testers - Financial Planning
HighTower Portal Testers - Estate Planning
Vault Admin
Owner
Dana Sharpe
Editor
Vault Admin - BI
Co-owner
Vault Admin - DS
Co-owner
Vault Admin - EH
Co-owner
+5 People
Externally Shared
Shared Link
Create Link
File Request
Create Link
Step 2: Click on the subfolder name where your advisor would like a document placed.


box
All Files
Recents
Notes
Trash
My Collections
Favorites
Search Files and Folders
Vault
All Files > Sharpe Client Household - Shared Files > HighTower Portal Testers - Taxes
New +
Share
Folder
Box Note
File Upload
Folder Upload
Folder
Box Note
Box Note From Template
Bookmark
Pages Document
Keynote Presentation
Numbers Spreadsheet
Step 3: click on the "New +" button to expand the menu. Then select "File Upload."
Get started by adding your first file
Create new documents directly within Box or upload an existing file
Upload
Shared Link
Create Link
File Request
Create Link

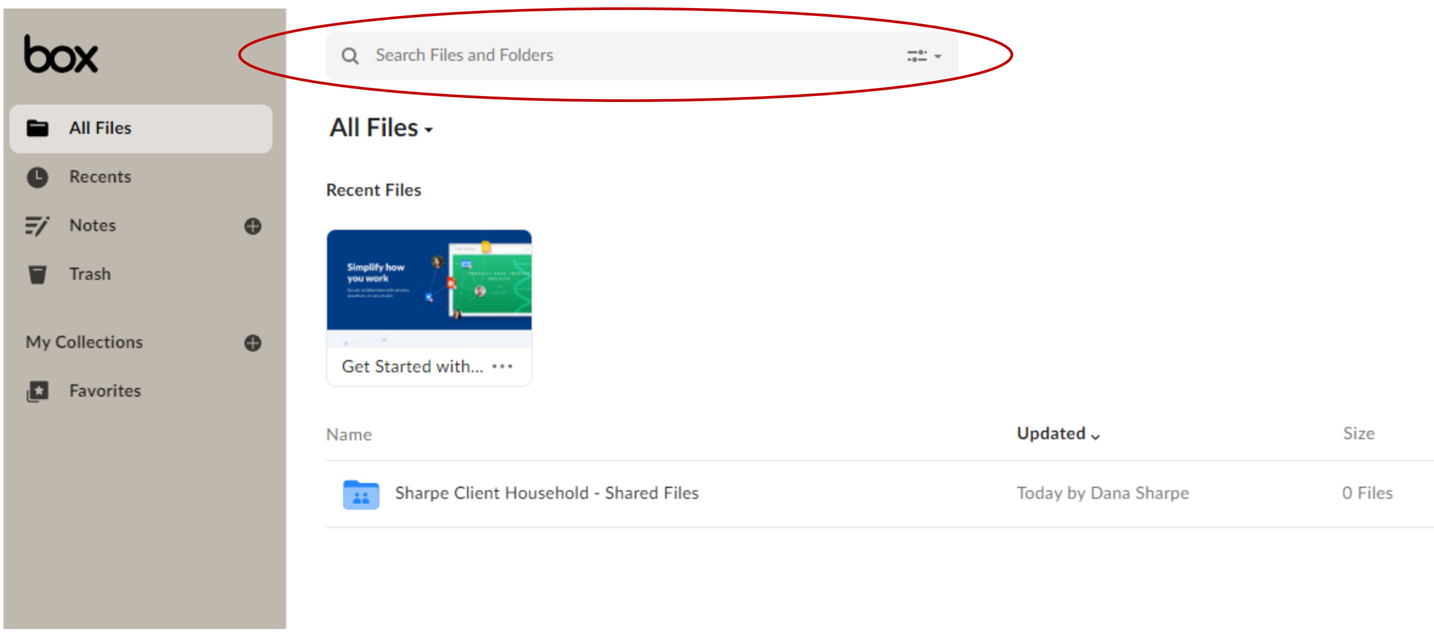
## E. Locate and open a document shared by your Advisor.

Once your files are in the Well-th Vault it's easy to access them wherever you are. You have three slick shortcuts at your disposal: the Search tool, Jump to Folder and the Updates view.

### Search

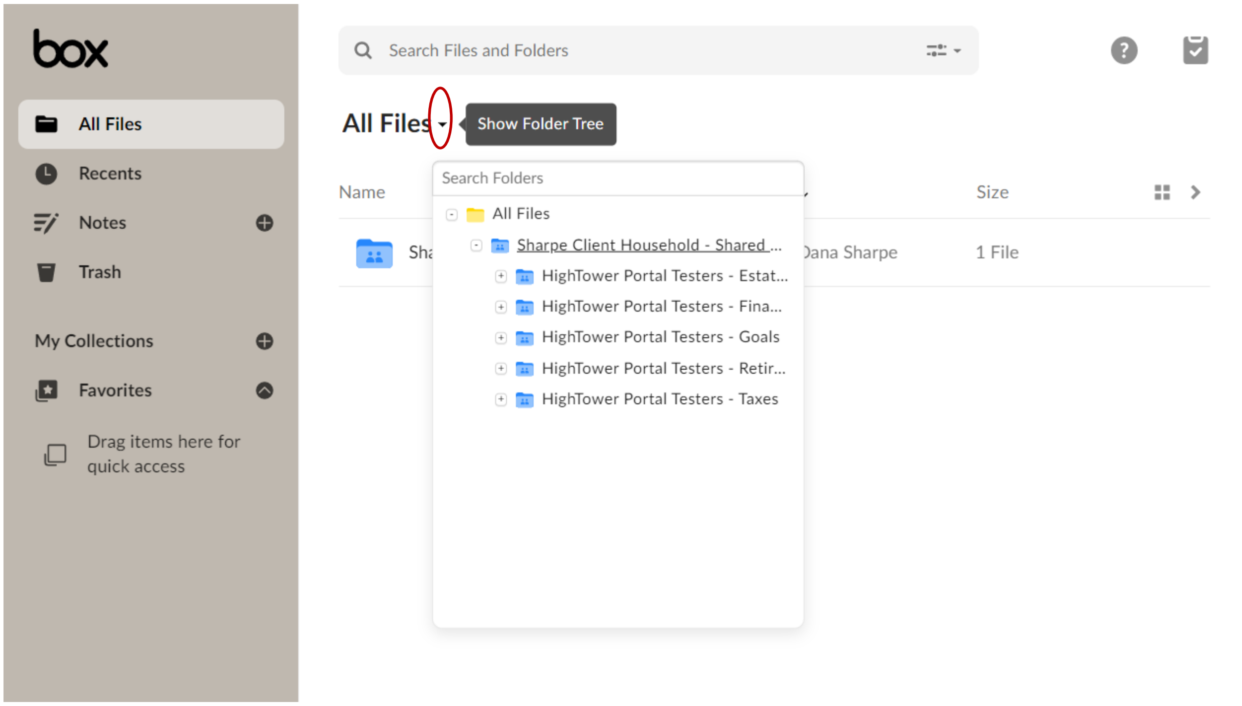
If you're looking for a certain file – or even a certain word or phrase within a file – jump right to it with the Search tool. Just enter your key word or phrase into the search bar at the top of your page.

The Well-th Vault will search the titles of your files and folders as well as the body of your documents.



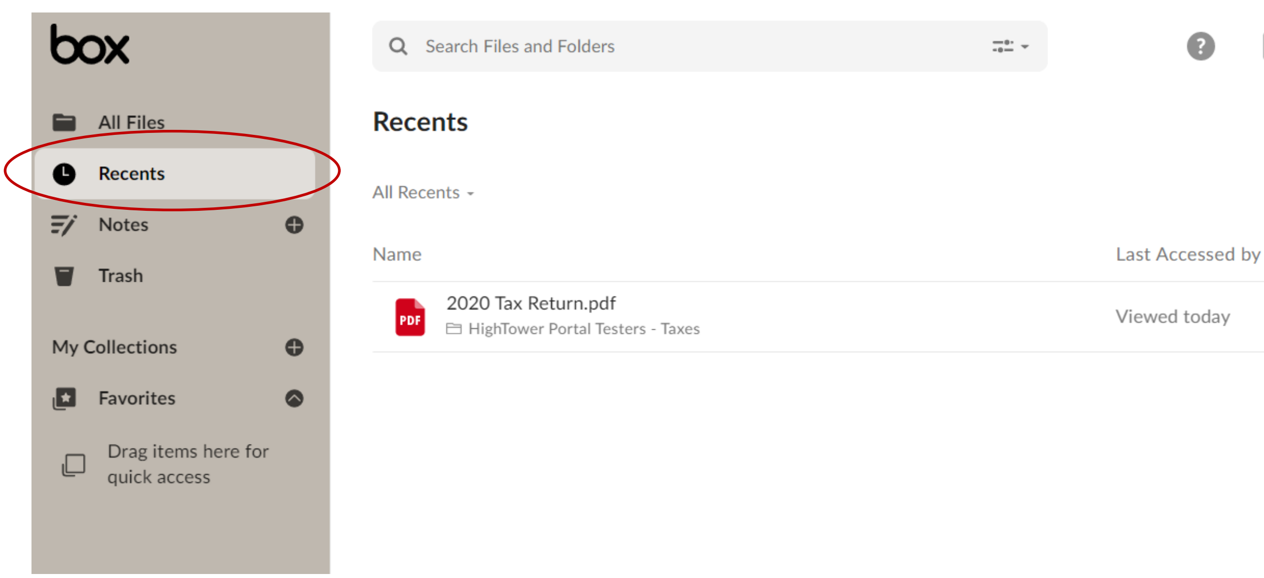
## Folder Tree

If you want to get to a folder quickly, use the Folder Tree tool. Simply click the down arrow next to All Files and select "Show Folder Tree" to see your entire folder structure. Click on the desired subfolder to be taken directly there.



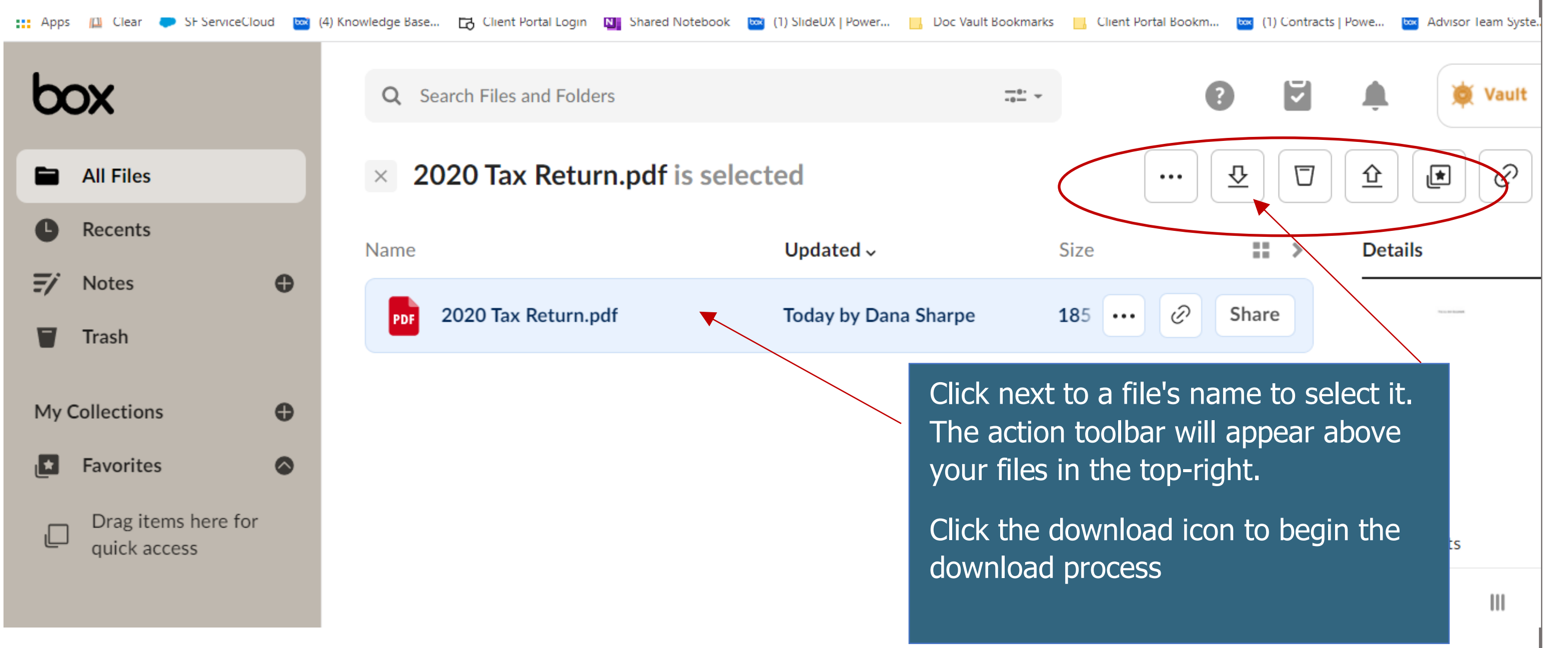

## Recents

On this page, you'll see what files and folder have been recently updated in your vault account. To view recent updates, click "Recents" in the left side bar.



## F. Download a file shared by your Advisor.

To Download a Single File:




To Download Multiple Items:

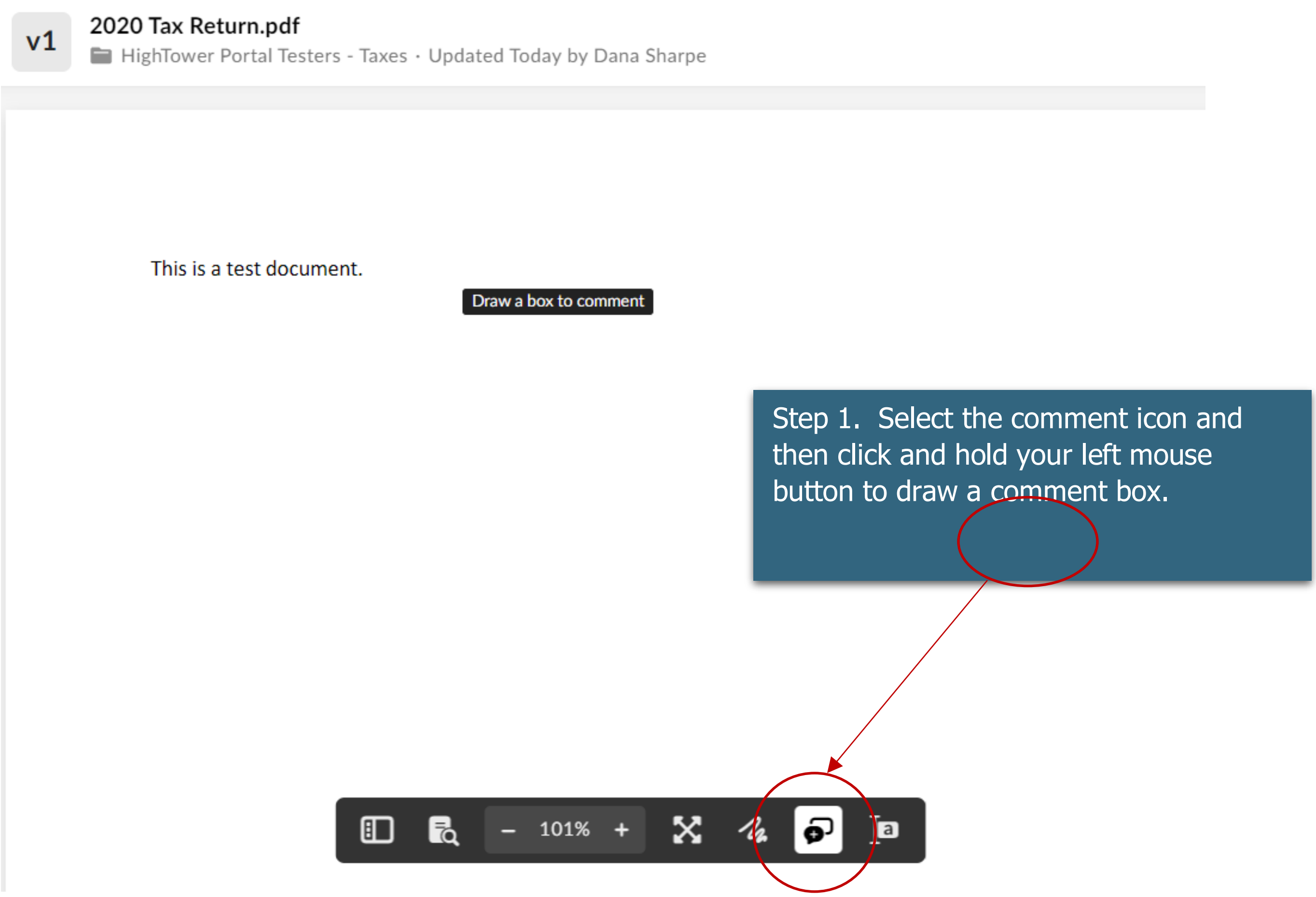
- Shift+click on multiple items to select them. The action toolbar will appear above your files in the top-right.
- Click **Download** to begin the download process. Your selected items will be downloaded together in a single zip file.

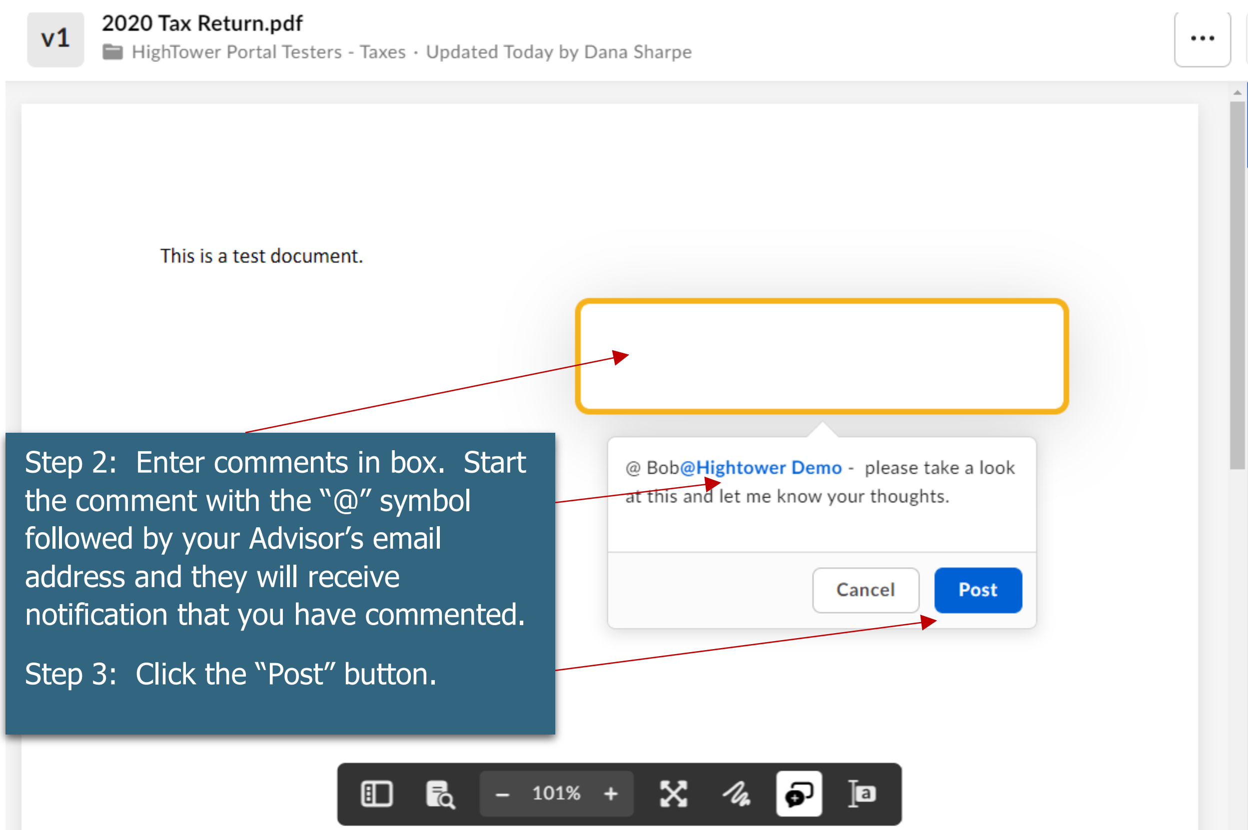
## G. Add comments or annotations to files.

Comments provide a powerful way to drive discussion around content in your Vault account. Use comments to request feedback from your Advisor, make notes to yourself, notify your Advisor of updates to a file, and a variety of other social interactions.

You can view comments in the Preview page of a file within the sidebar to the right or post your own in the "Write a comment" box at the bottom. Your Advisor can reply directly to a comment or add their own comments.

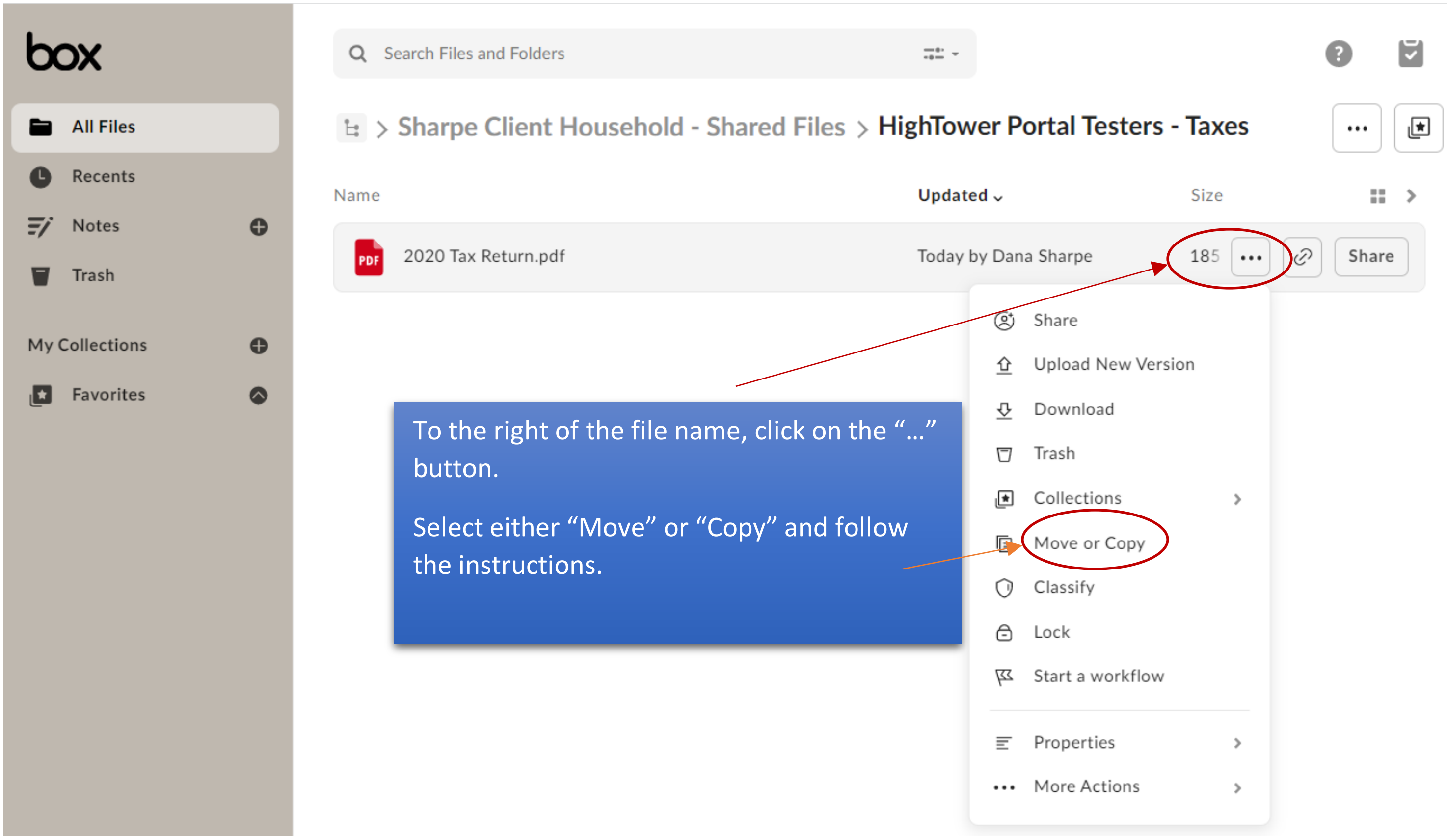
Communicating with your Advisor:






This message also remains with the file or folder on which you've commented. This gives context for others coming to work with this information.

H. Move or copy files from folder to folder.
Locate the file you wish to move or copy.




Add subfolders as desired.

- Click New, and from the menu that displays click New Folder. The Create a New Folder dialog box displays.
- Enter the folder name.
- Advisors will automatically have access to any folders added.

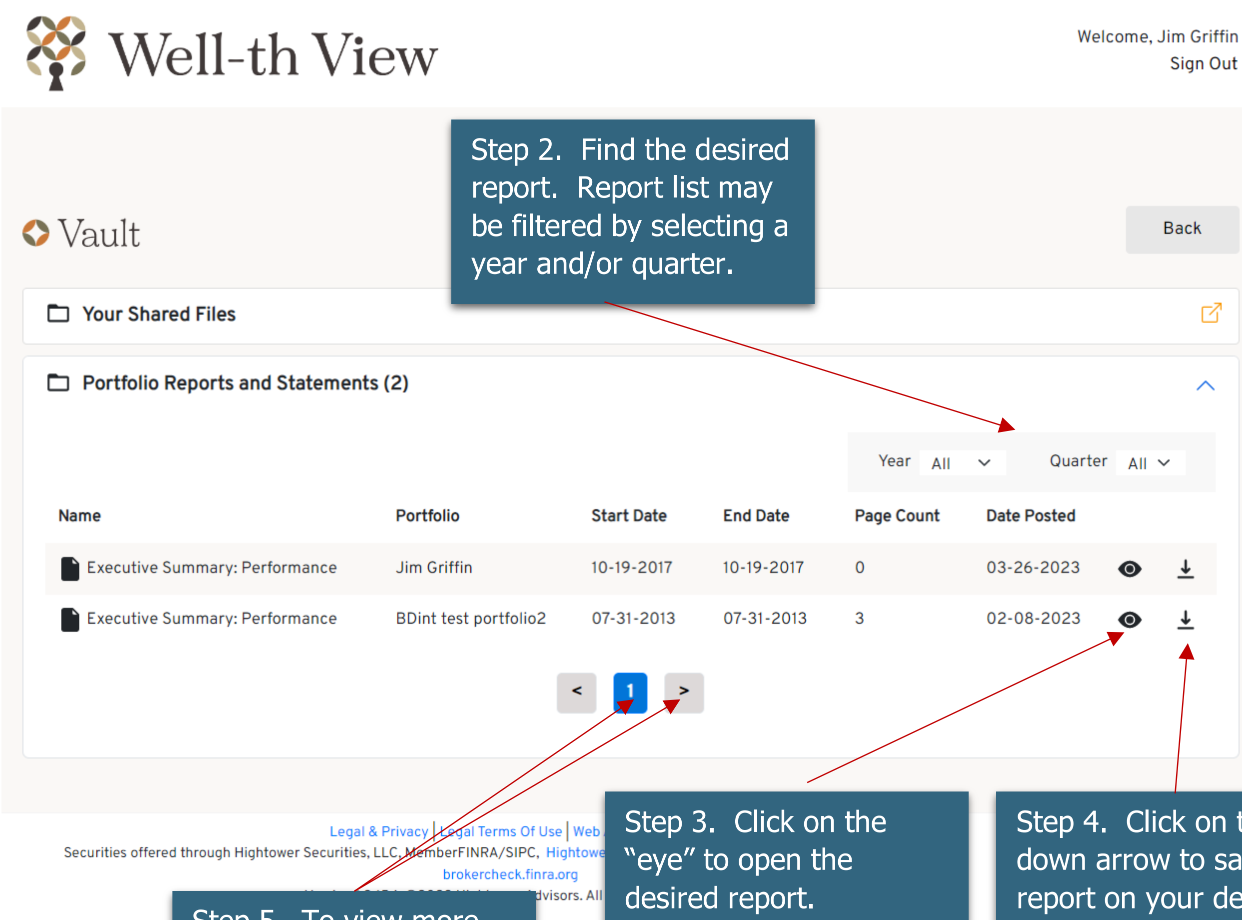
Email Notifications

To keep you apprised of current events in your account, we've built an email notification system that lets you know when your Advisors accesses your content or edits your files.  You will receive an email when your Advisor shares files with you too.

## I. Access Performance Reports created by your Advisor and shared with you.

NOTE: You may not see the Portfolio Reports and Statements folder if those reports are not available.


Step 1. Click on "Portfolio Reports and Statements" to see a list of reports that have been created and shared by your advisor.

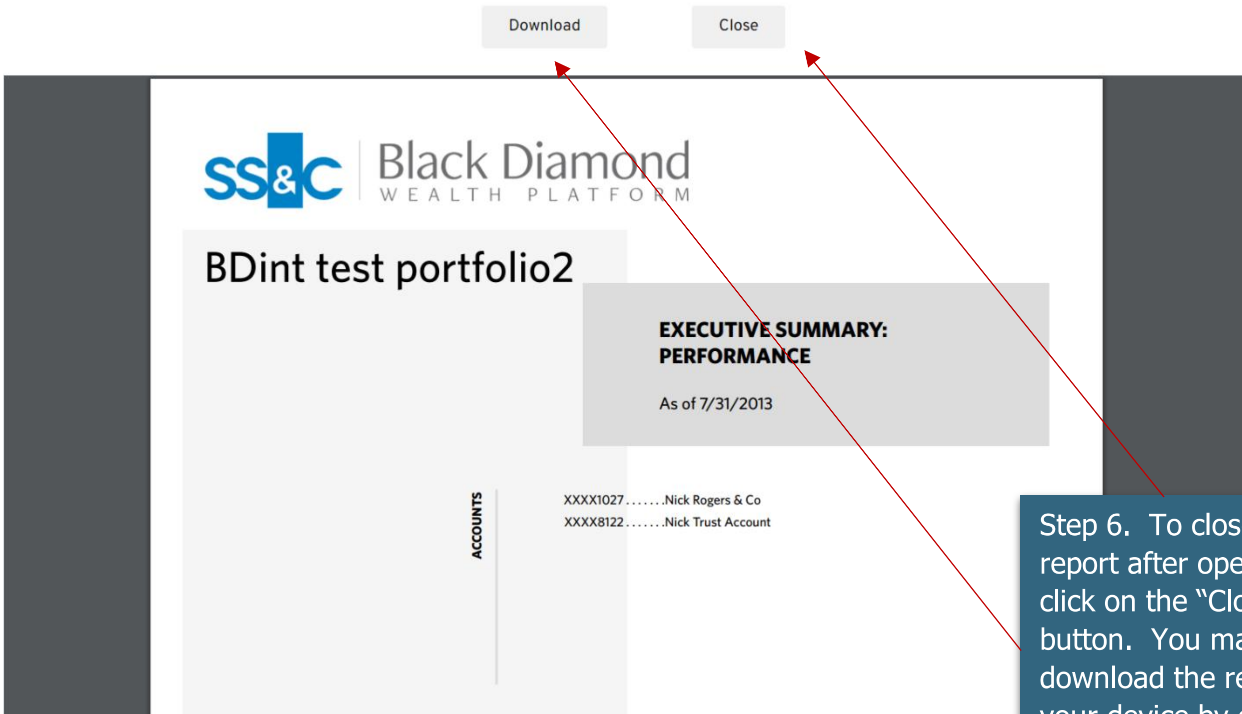



Step 2. Find the desired report. Report list may be filtered by selecting a year and/or quarter.

Step 3. Click on the "eye" to open the desired report.

Step 4. Click on the down arrow to save the report on your device.

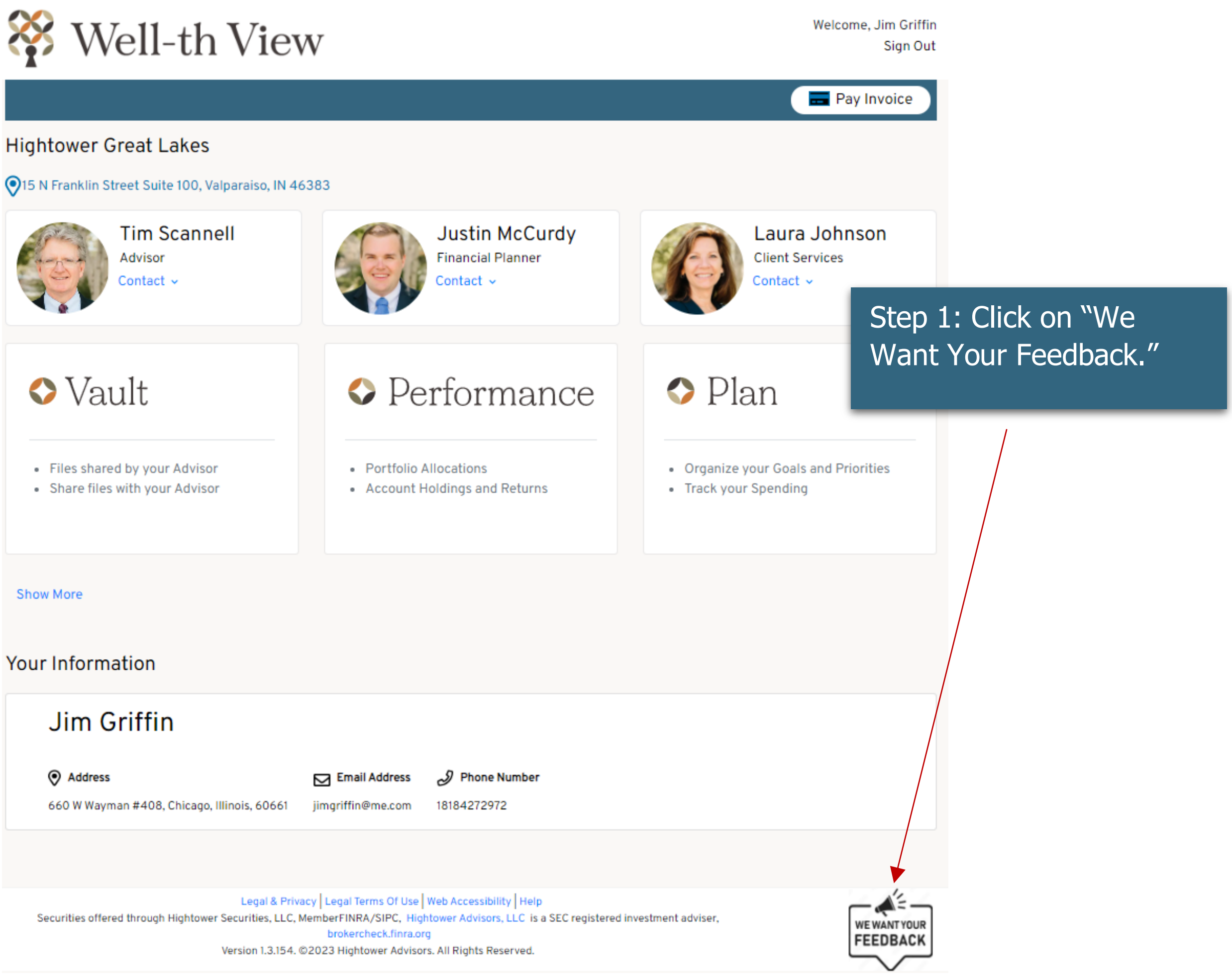
Step 5. To view more reports, click on the page number or ">" button.

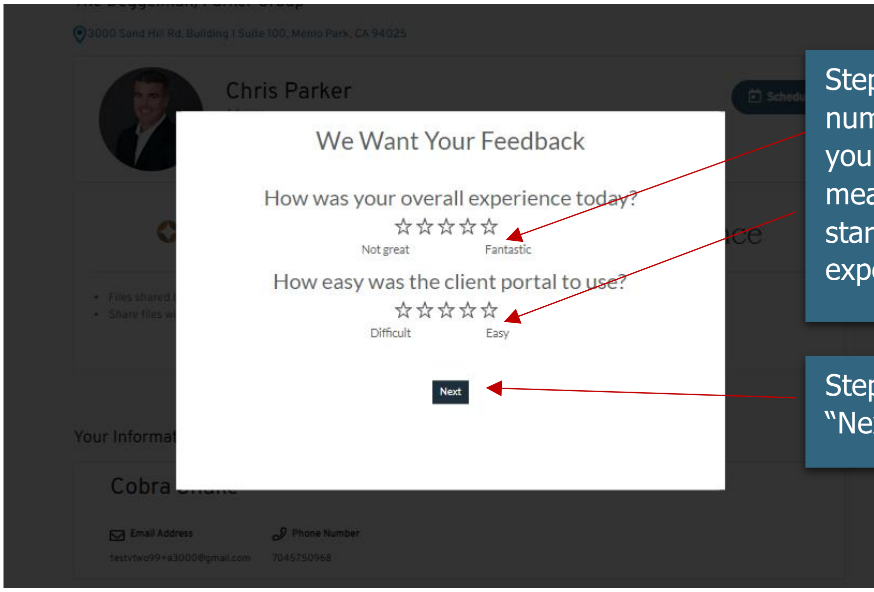



Step 6. To close a report after opening, click on the "Close" button. You may also download the report to your device by clicking on the "Download" button.

## J. Provide Feedback on the Well-th View or Well-th Vault Portals.

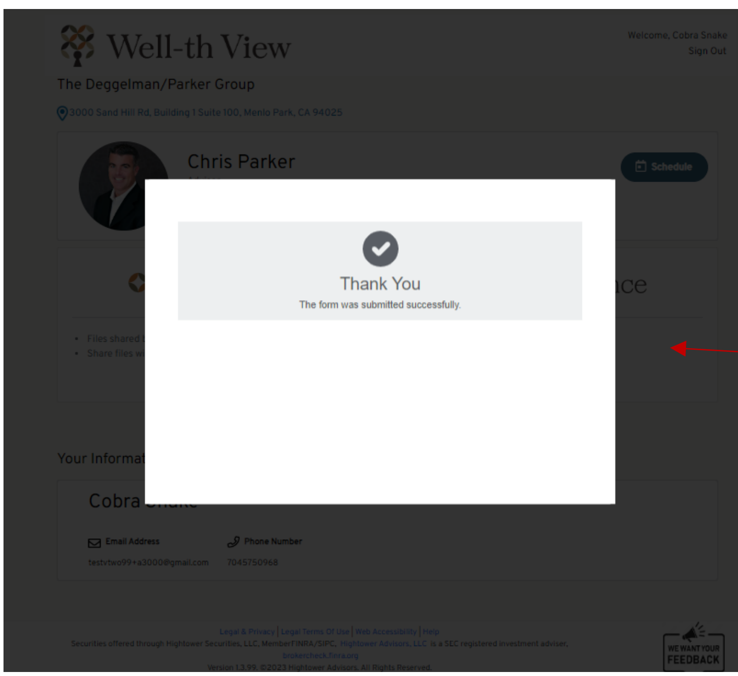
We value your opinion and would like to hear about your experience with Well-th View. A feature that allows you to rate your experience has been added.






Step 2: Click on the number of stars to rate your experience (one star means not so good, five stars means fantastic experience).

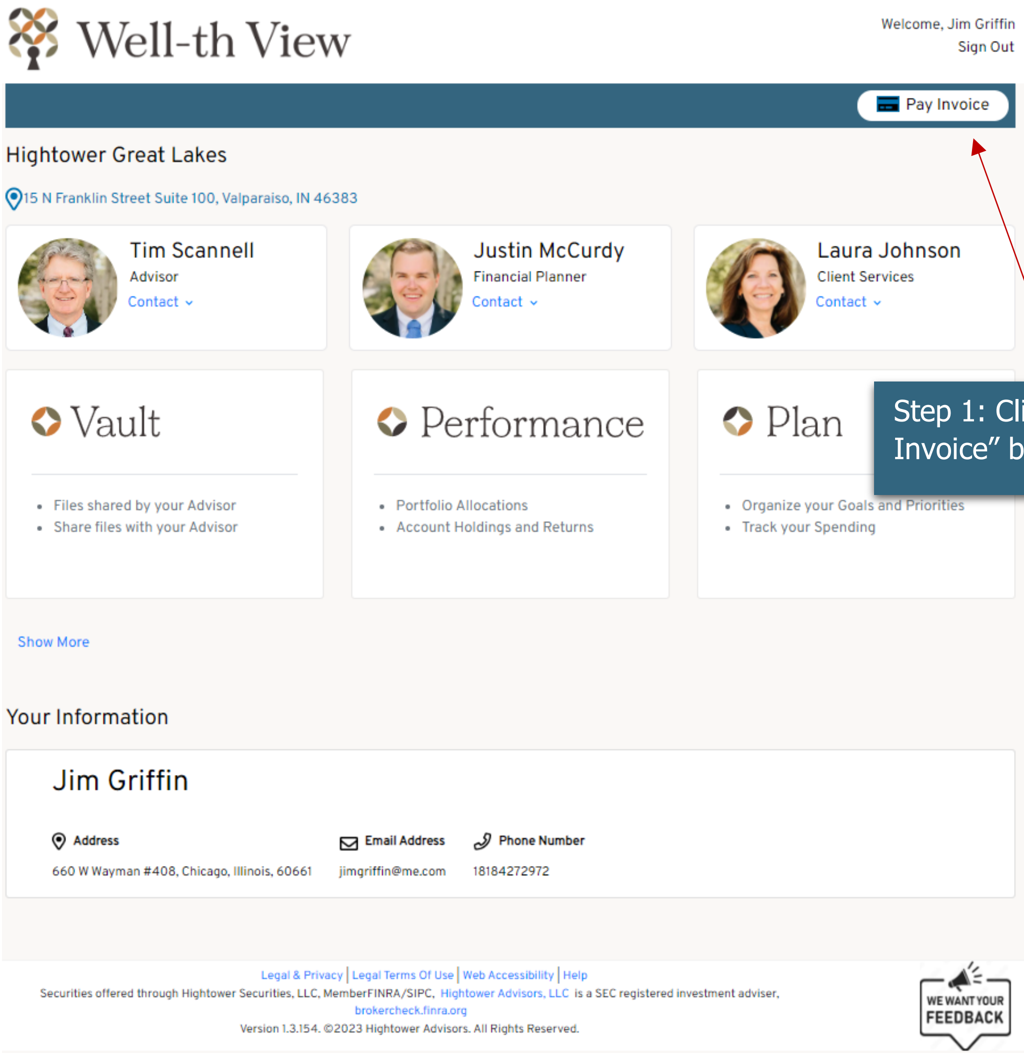
Step 3: Click on the "Next" button.



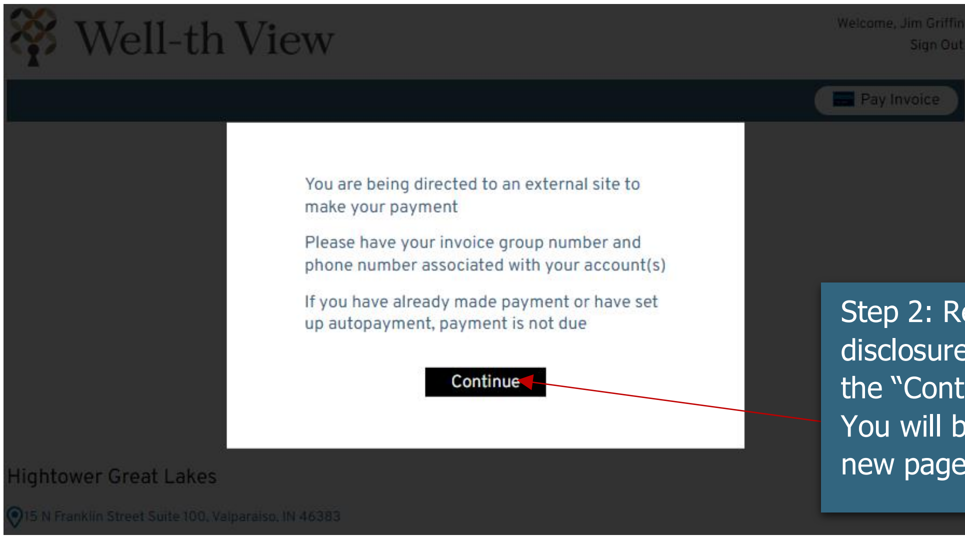

Step 4: Page will auto-close.

## K. Invoice Payments

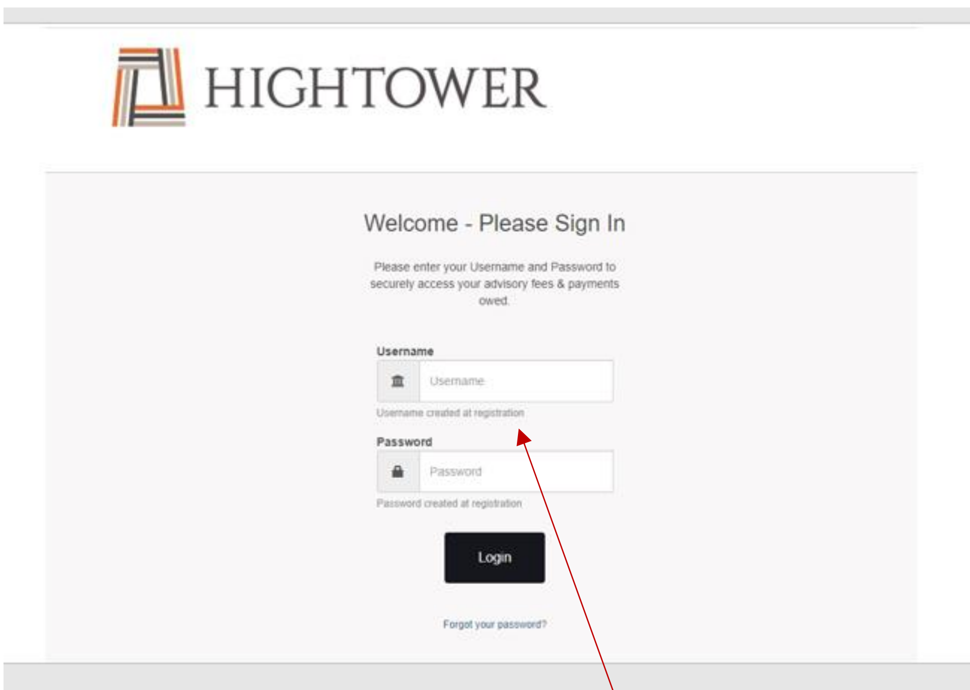
If you have chosen to receive an invoice for any advisory fees from your advisor, you will see a link on the Well-th View Home page that allows you to pay your invoice online. Note: Pay Invoice is not applicable to all users.




Step 1: Click the "Pay Invoice" button.




Step 2: Read the disclosure and then click the "Continue" button. You will be directed to a new page




Step 3: Enter your username and password to pay your advisory fees and any payments owed.

## L. Where to find this User Guide

You may access this User Guide from help links found at the bottom of the Well-th View home page or on the login page you see when you navigate here: https://well-thview.com/

# II. Appendix – Cookie Settings Help

NOTE: Internet Explorer is not supported. Please use one of the supported browsers listed below.

## A. Google Chrome

To enable cookies in Google Chrome (PC):

1. Select the Chrome menu icon (upper right corner, 3 vertical dots).
2. Select Settings.
3. Select Security and Privacy. Select cookies and other site data.
4. Make sure “Block all cookies” is not checked.

To enable cookies in Google Chrome (Mac):

1. Open Chrome preferences click on Settings, then Show Advanced Settings.
2. Under Privacy, click on Content Settings.
3. Make sure “Block all cookies” is not checked.

If your browser is not listed above, please refer to your browser’s help pages.

To enable cookies in Google Chrome (Android):

1. On your Android device, open the Chrome app.
2. At the top right, tap the vertical three dots icon and select “Settings”.
3. Tap Site settings and then Cookies.
4. Make sure “Block all cookies” is unchecked.

## B. Safari

To enable cookies in Safari (Mac):

1. Go to the Safari drop-down menu.
2. Select Preferences.
3. Click Privacy in the top panel.
4. Turn off “Block All Cookies”.

To enable cookies in Safari (iPhone/iPad iOS 11):

1. Open your Settings.
2. Scroll down and select Safari.
3. Under Privacy & Security, turn off “Block All Cookies”.

## C. Mozilla Firefox

To enable cookies in Mozilla Firefox 3.x (PC):

1. Click Tools > Options.
2. Click Privacy in the top panel.
3. Select the checkbox labeled 'Accept cookies from sites.'
4. Click OK.

To enable cookies in Mozilla Firefox 2.x (PC):

1. Click Tools > Options.
2. Click Privacy in the top panel.
3. Select the checkbox labeled 'Accept cookies from sites.'
4. Click OK.

To enable cookies in Mozilla Firefox 1.x (PC):

1. Click Tools > Options.
2. Click Privacy in the top panel.
3. Click the Cookies tab.
4. Select the checkbox labeled 'Allow sites to set cookies.'
5. Click OK.

To enable cookies in Mozilla Firefox (Mac):

1. Go to the Firefox drop-down menu.
2. Select Preferences.
3. Click Privacy.
4. Under Cookies, select the option 'Accept cookies from sites.'

## D. Edge

To enable cookies in the Microsoft Edge:

1. Open Microsoft Edge, select Menu (3 dots icon on top right corner of the browser) > Settings > Cookies and Site permissions > Cookies and Data stored > Manage and delete cookies and site data
2. Turn on "Allow sites to save and read cookie data (recommended)"