

This training guide will demonstrate the Mobile Client Site. The Mobile Client Site is a consolidated view of your financial information in your personal financial website.

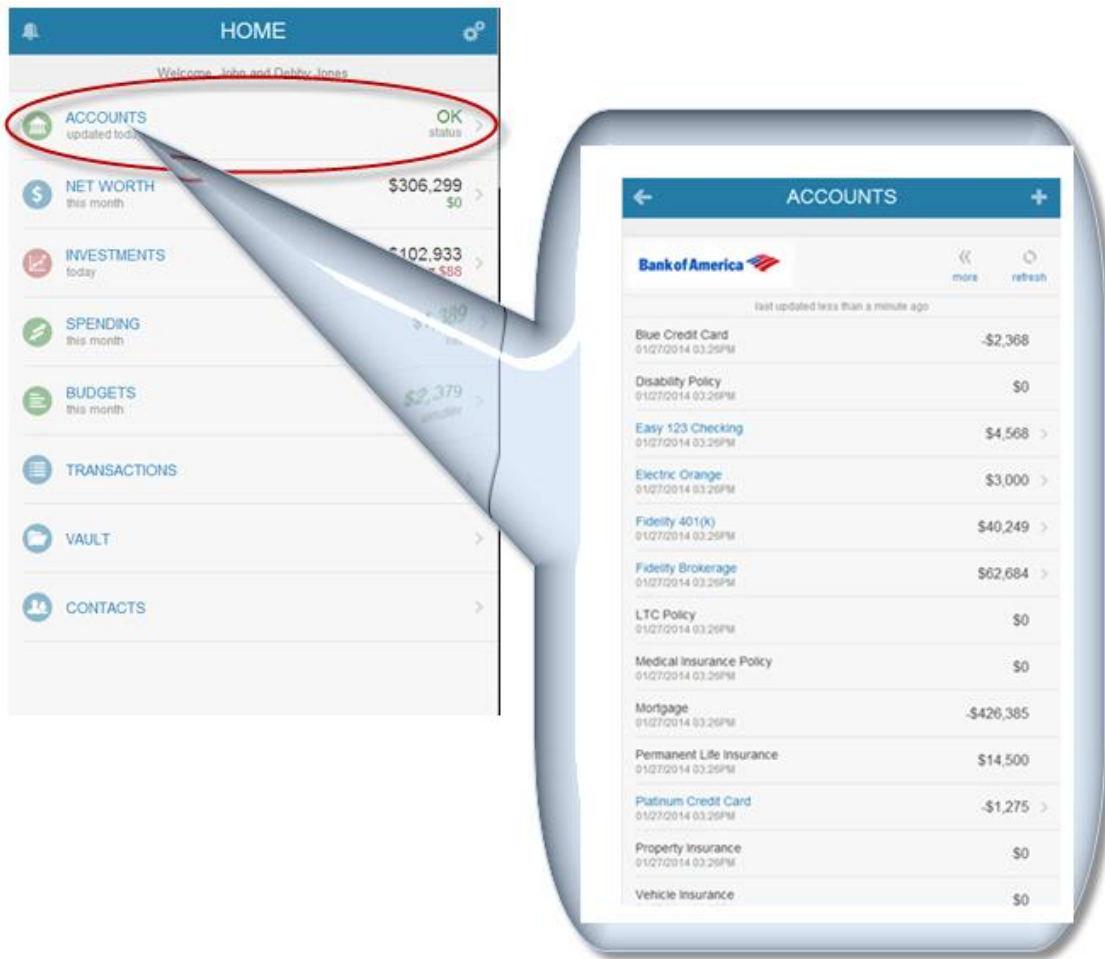
This guide will overview the following features: **Contacts, Accounts, Cash Flow, Budgeting, Transactions, Investments** and the **Vault**.

1. From your smart phone, click the mobile app and log in.

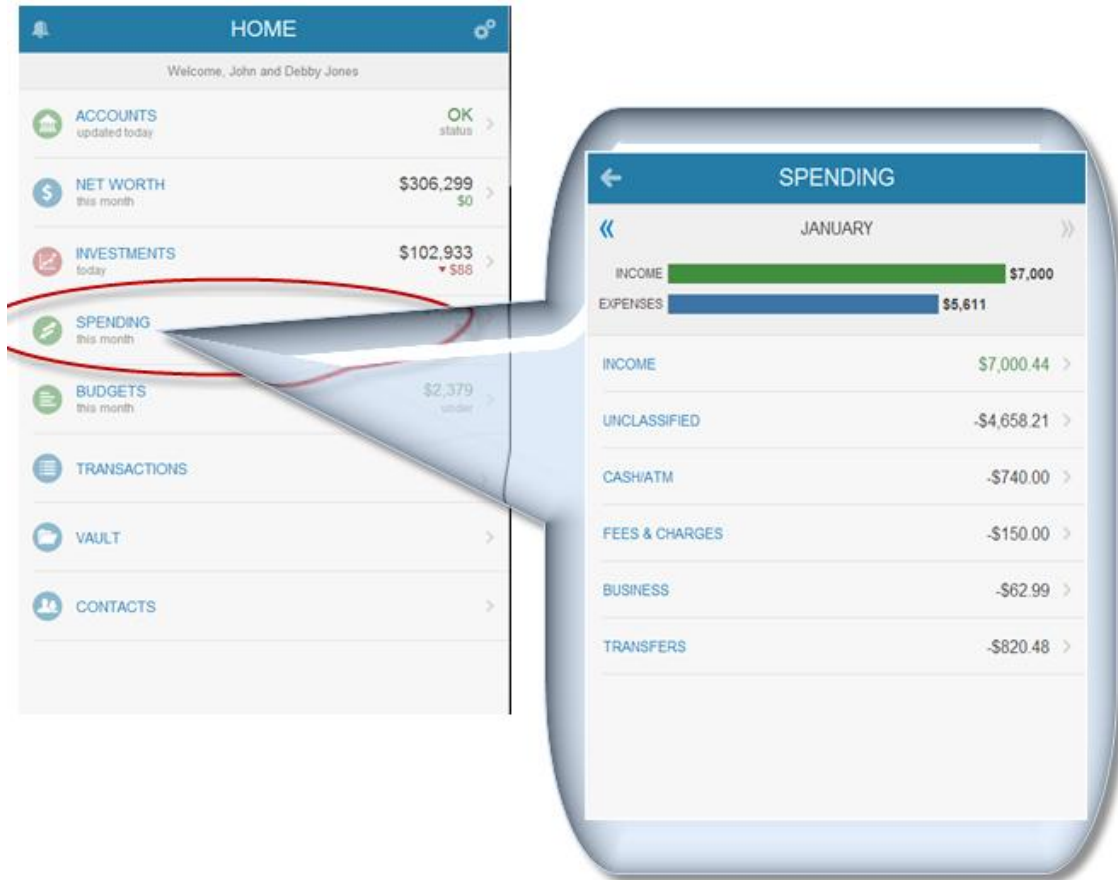
Please note:

If you do not have the mobile app saved in your phone, please go to [www.longfinancialplanning.com](http://www.longfinancialplanning.com) and then to “client login” and enter your login information. Once you have logged in agree to download the mobile app.

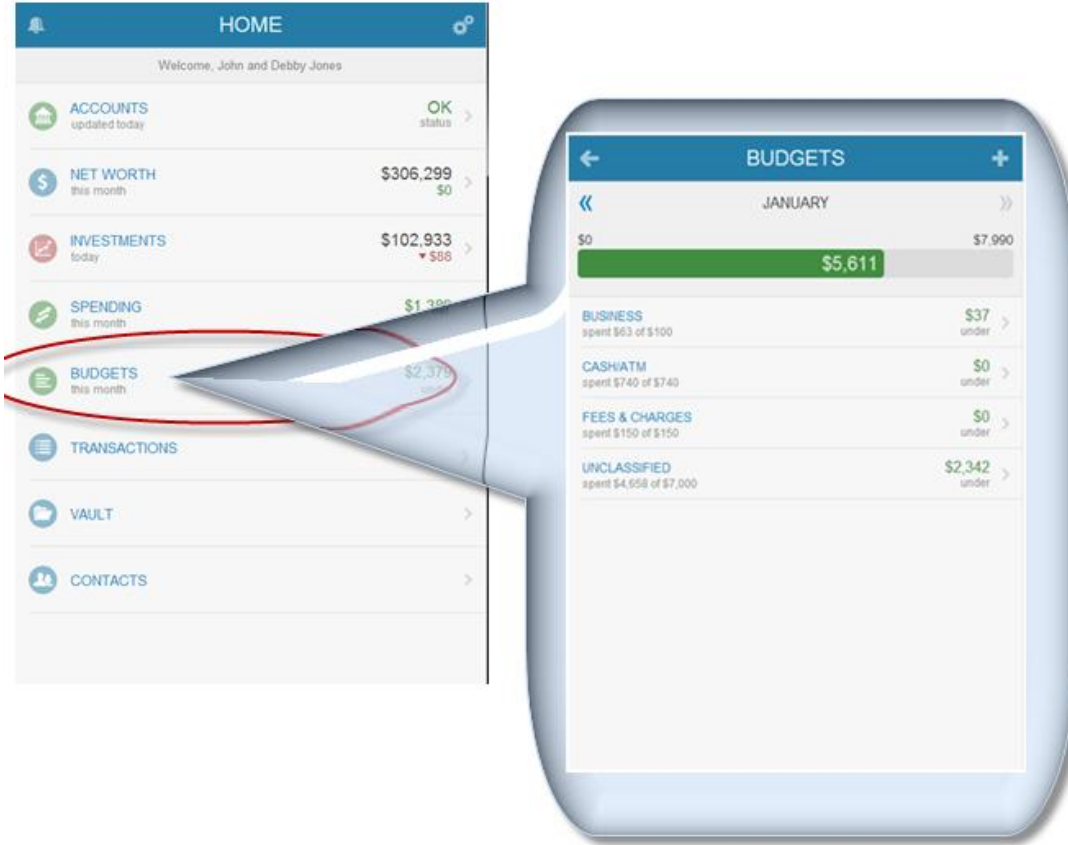
2. Tap the **Accounts** tab to view your latest account data.



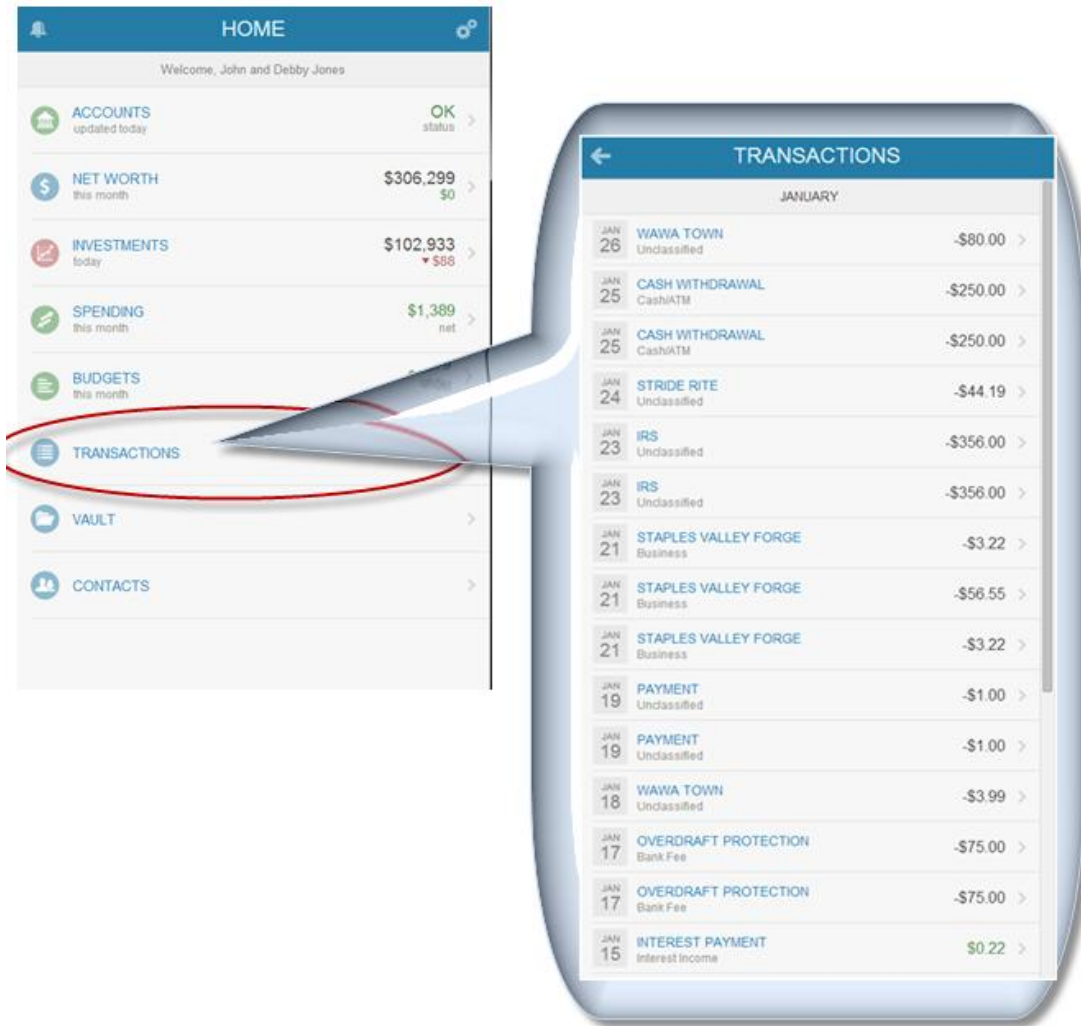
3. Tap the **Spending** tab to track your spending habits.
  - a. Spending tab provides with your recent spending by category and month imported from connected accounts.



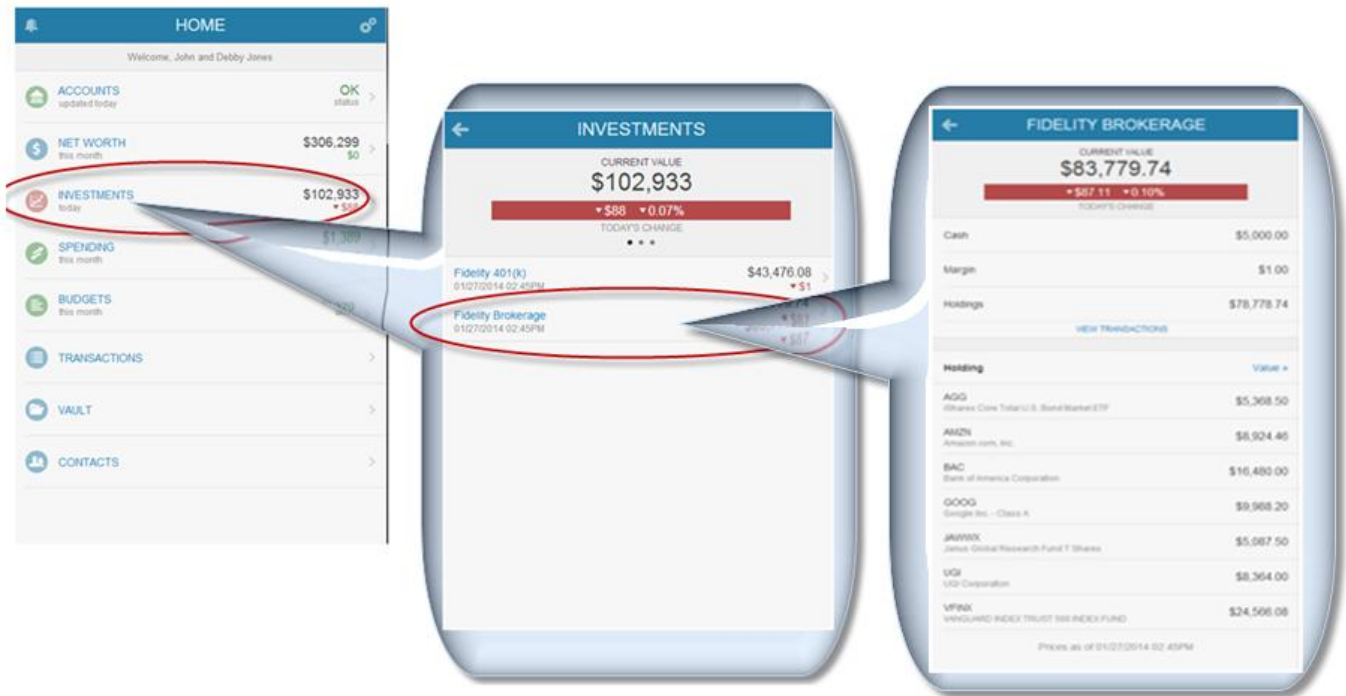
4. Tap the **Budget** tab to see a snapshot of your budget to monitor if you are on track.



5. Tap **Transactions** tab to display your recent transactions details from your connected accounts.



6. The **Investments** tab allows you to view up to date market information based off of any connected investments.
7. Tap an account name to see a holdings break down of a given account.



8. Tap the **Vault** to view personal documents in electronic format.
  - a. Tap **Shared Documents** to upload documents and allow your advisor to view the contents.
  - b. Tap **My Documents** to upload documents into a private folder where only your access can view the contents.

