

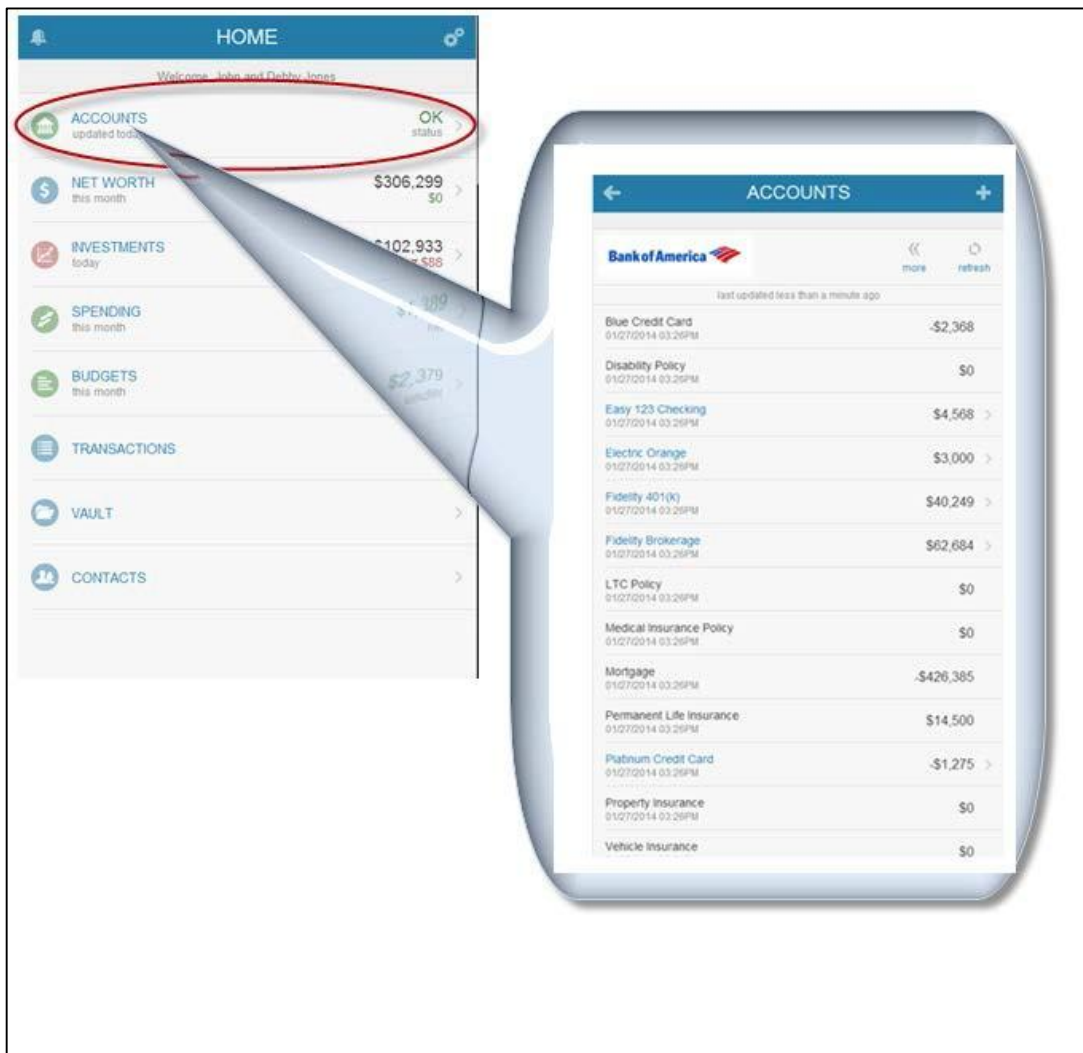
This training guide will demonstrate the functionality of the Mobile Client Site. The Mobile Client Site is a consolidated view of the financial information in your personal financial website.

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

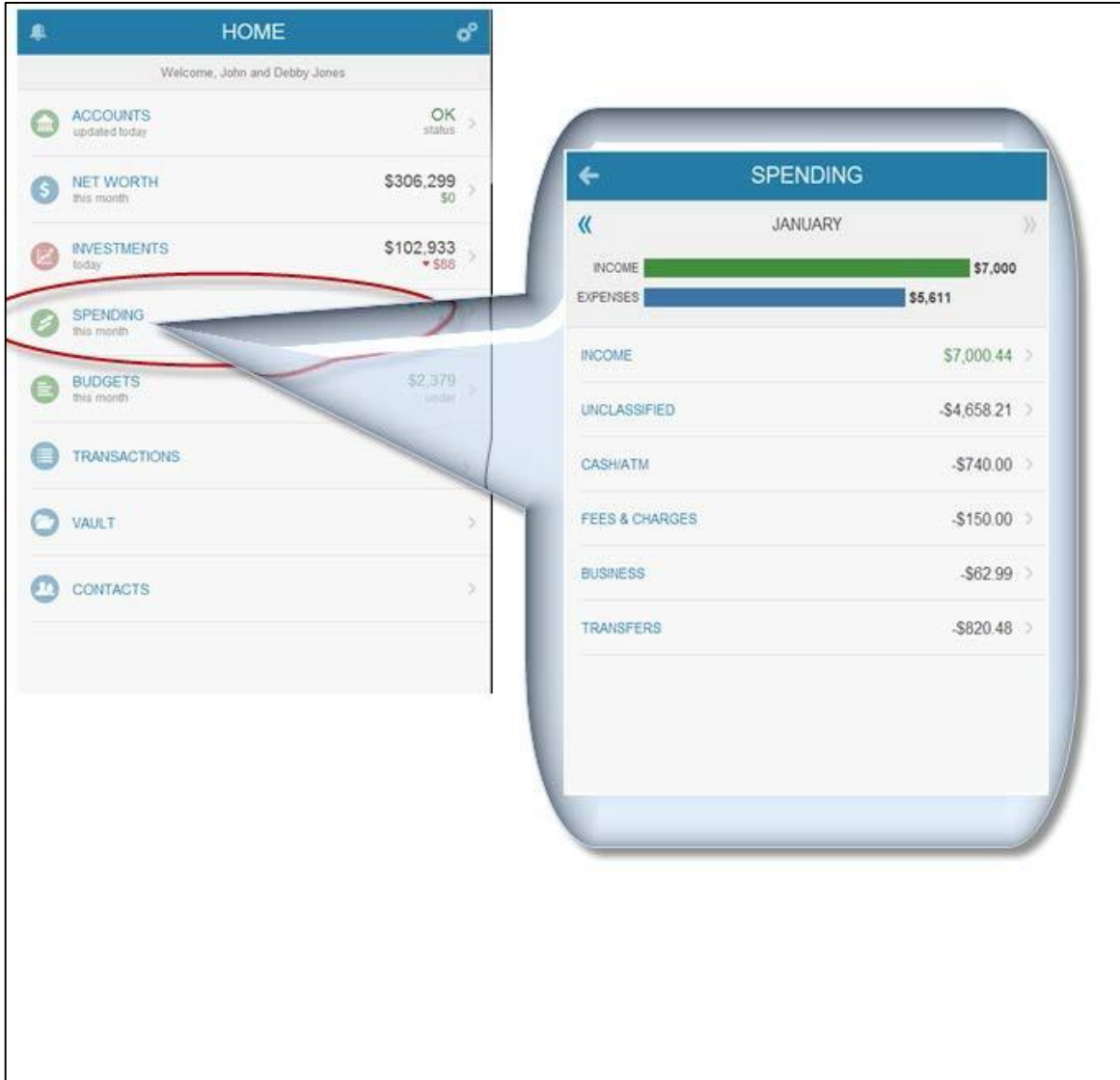
1. From your smart phone, click the mobile app and log in.

Please note:
If you do not have the mobile app saved in your phone, please refer to the "Add 1080 eMoney app to mobile device" user guide.

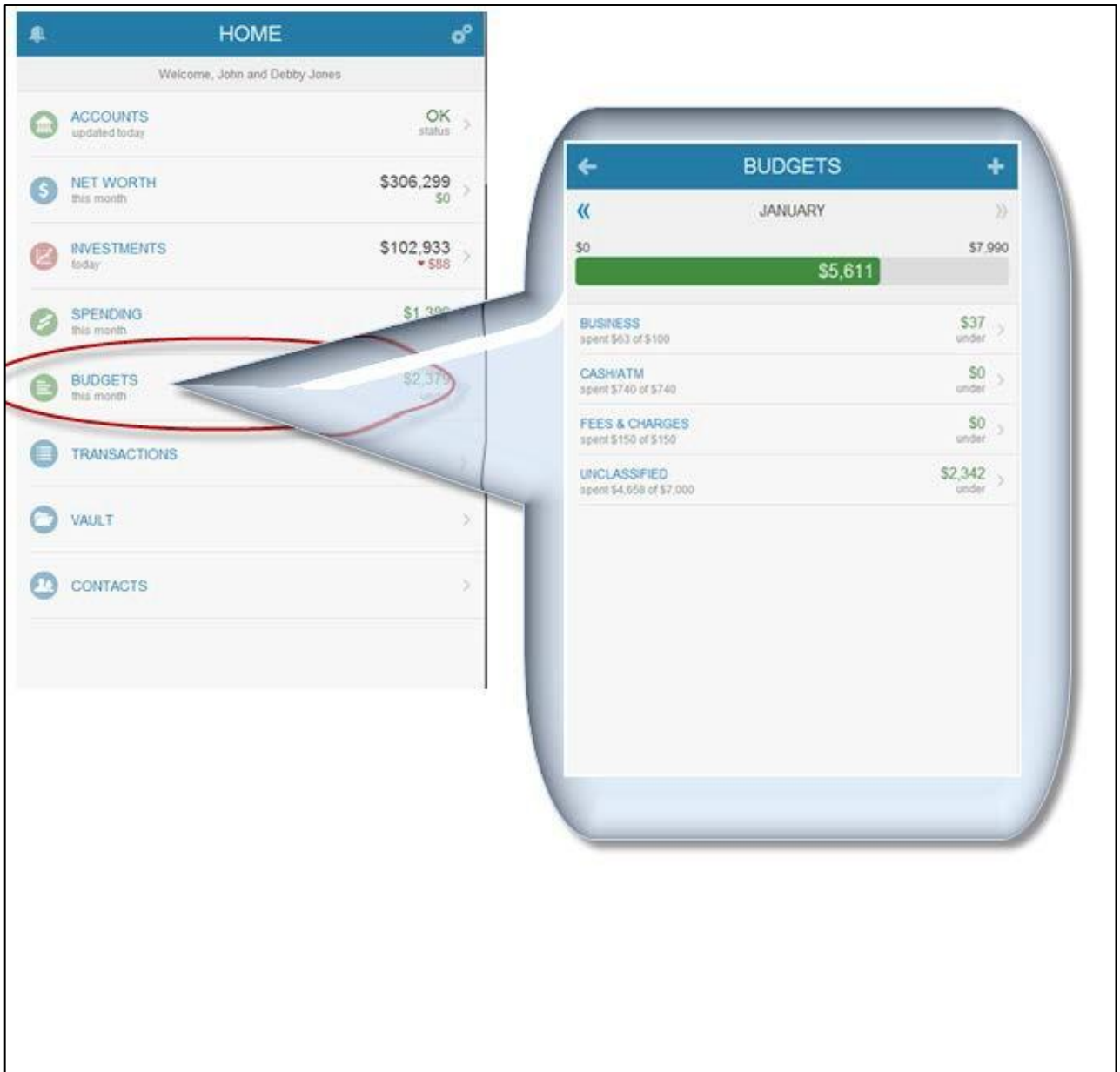
2. Tap **Accounts** to view your latest account data.



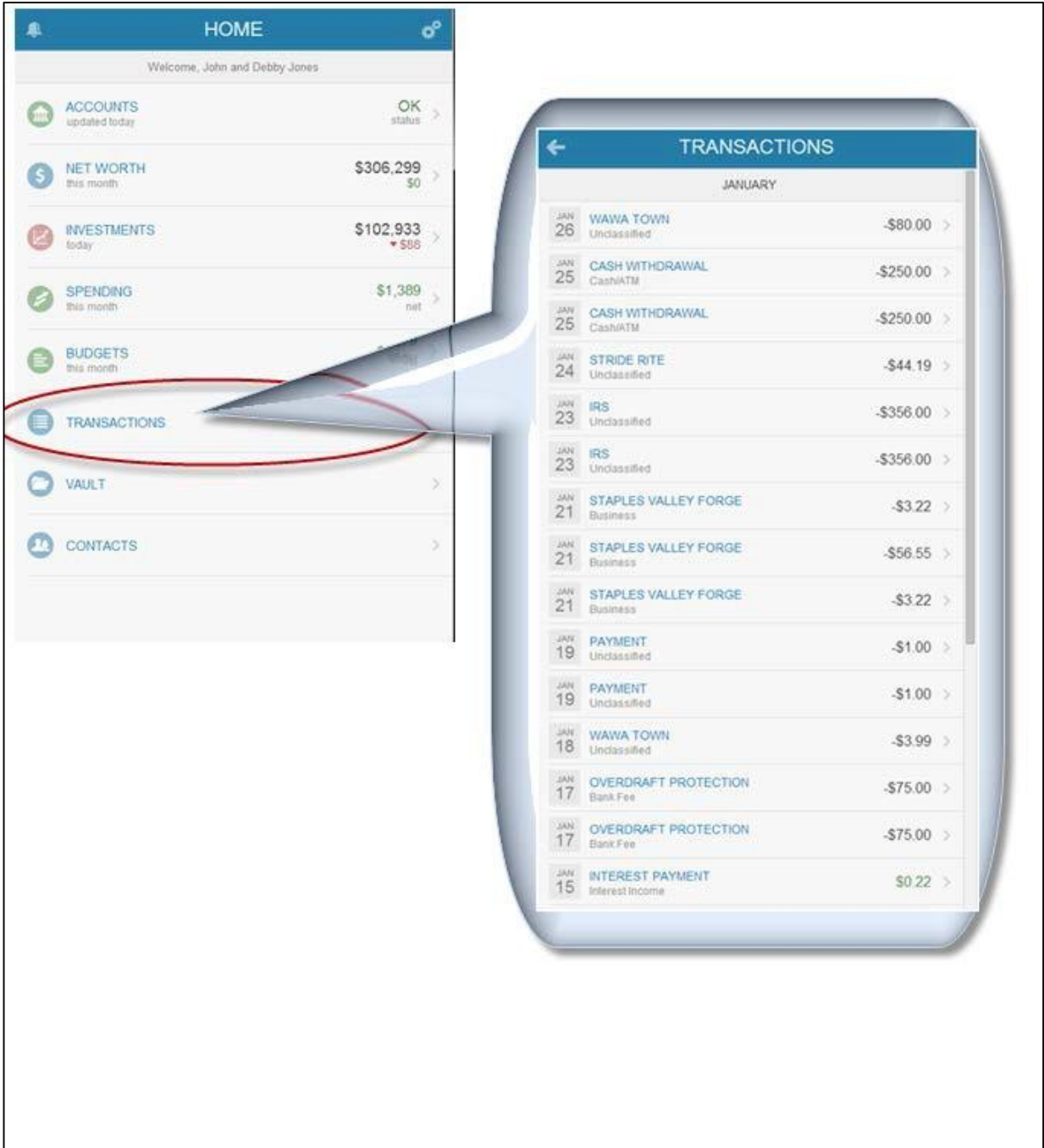
3. Tap **Spending** to view recent spending data by category. This data is imported from connected accounts.



- 4. Tap the **Budgets** tab to see a snapshot of your budget.



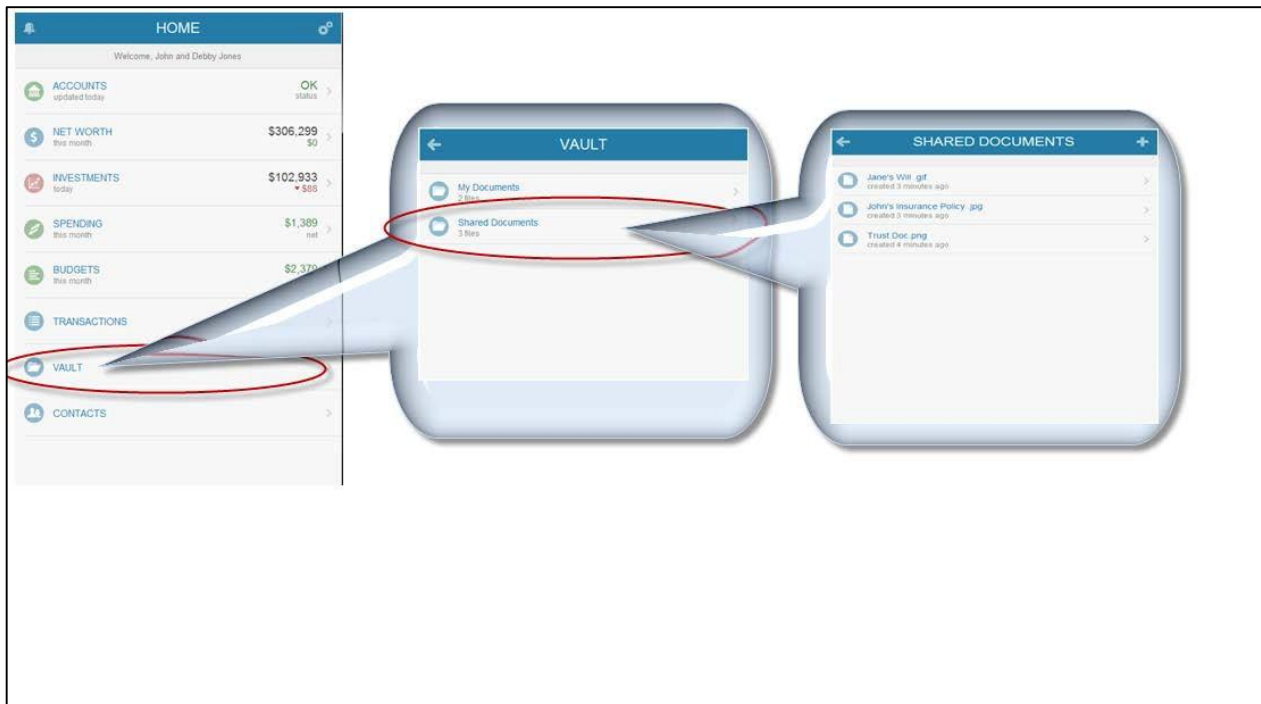
5. Tap **Transactions** to view your recent transaction details from your connected accounts.



6. Tap **Investments** to view up-to-date market information for any connected investment.
7. Tap an account name to see a holdings break down of that account.



8. Tap **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 you can view the contents.



Please note:

For more information on uploading into the mobile vault, refer to the "How to Upload to the Vault from a Mobile Device" user guide.