



## Personal Finance Tour



### Navigation

#### Left Menu Options



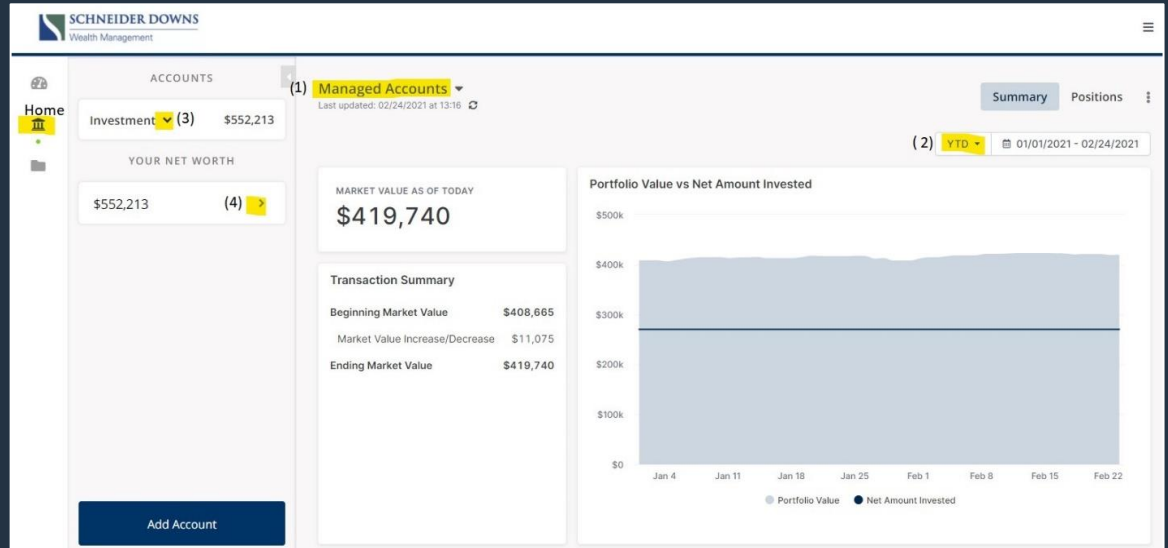
#### Home Page "Personal Finance"



#### Consumer Overview



#### Secure Vault



Click the down arrow on "Managed Accounts" to expand to the individual managed accounts. Managed Accounts are those directly under management by SDWMA.



Choose your date range, either pre-determined or custom.



Click the down arrow next to "Investments" to see all accounts, managed and unmanaged. We may download unmanaged accounts for you, or you can add them using the instructions below.



Click the arrow under "Net Worth" next to the account balance to see the Balance Sheet View or Accounts View.



## Personal Finance Tour (cont.)

Add Account



Select Account Type and, if applicable, Sub-Type:

Select an account

Bank Account

Investment Holding

Credit Card

Mortgage

Loan

Real Estate Asset

Business Asset

Miscellaneous Asset



Enter Market Value and Description, and Save:

Back

Investment

Market Value

Description

Institution

Search...

Save



Navigation

Left Menu Options



Home Page  
"Personal Finance"



Consumer Overview



Secure Vault



# New Orion Client Portal Tour



## Consumer Overview Tour



### Navigation

### Left Menu Options



### Home Page "Personal Finance"



### Consumer Overview



### Secure Vault

**SCHNEIDER DOWNS**  
Wealth Management

ACCOUNTS

Investment ▼ \$552,213

YOUR NET WORTH

\$552,213

Menu here is the same as Personal Finance View

**Overview**

Let's manage your new financial journey.

Net Worth (Year to date)

NET WORTH ASSETS LIABILITIES

Transactions Current (past 30 days)

**Newsfeed**

FEBRUARY 2021

"Our Thoughts On" SDWMA  
February 16

**Financial Boot Camp Series: Is Life Insurance A Savings Vehicle?**

In our January article, we covered life insurance basics. This month, we probe further into permanent life insurance policies and the commonly asked question.

Supporting Link

**Point of View- Investing**  
February 16

**The GameStop Saga: Our Thoughts**

Supporting Link



## Secure Vault Tour

**SCHNEIDER DOWNS**  
Wealth Management

Document Vault

Home Folder

Upload New Folder

DOCUMENTS	MODIFIED	FILE SIZE
Portfolio Statements		
SD Wealth Management ADV Part 2B December 2020 Final.pdf	1/21/2021, 11:17:56 AM	353.3 KB

All documents will be accessible by your adviser

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## Need Assistance?

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