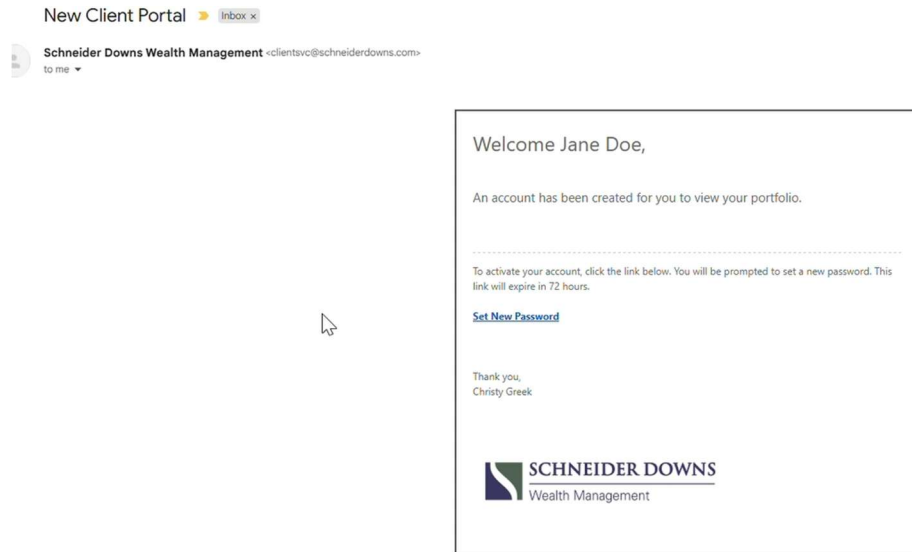
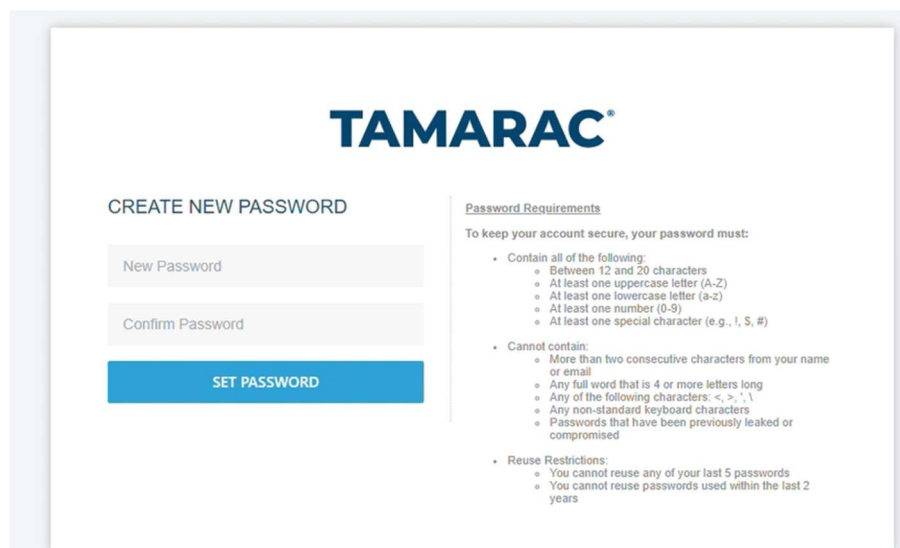


Logging in for the first time

Step One: Click the Link in the portal invitation email you received. The email should look similar to the one below and the sender will be clientsvc@schneiderdowns.com

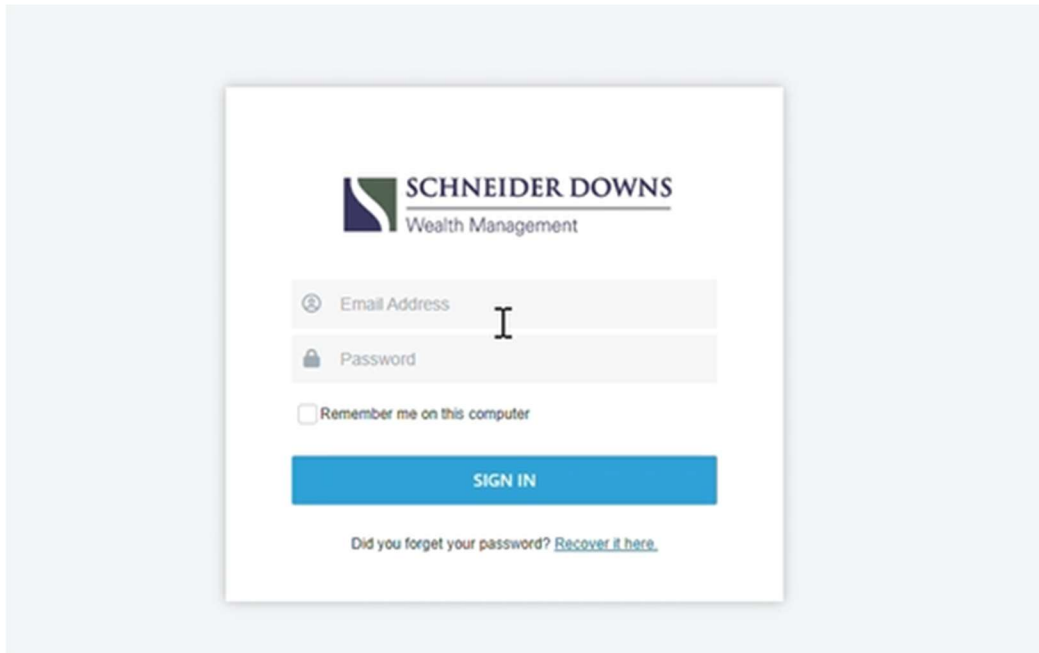


Step Two: The link will open your browser to a Create New Password page. Create a password using the requirements to the right of the password text field.

The image shows a screenshot of a web page titled "TAMARAC®". Below the title is the heading "CREATE NEW PASSWORD". There are two input fields: "New Password" and "Confirm Password". Below these fields is a blue button that says "SET PASSWORD". To the right of the input fields is a section titled "Password Requirements". It starts with "To keep your account secure, your password must:" followed by a bulleted list of requirements. The requirements are: "Contain all of the following:" (with sub-bullets: "Between 12 and 20 characters", "At least one uppercase letter (A-Z)", "At least one lowercase letter (a-z)", "At least one number (0-9)", "At least one special character (e.g., !, \$, #)"), "Cannot contain:" (with sub-bullets: "More than two consecutive characters from your name or email", "Any full word that is 4 or more letters long", "Any of the following characters: <, >, ', \""), "Any non-standard keyboard characters", "Passwords that have been previously leaked or compromised"), and "Reuse Restrictions:" (with sub-bullets: "You cannot reuse any of your last 5 passwords", "You cannot reuse passwords used within the last 2 years").

Client Portal Instructions & Overview

Step 3: Once a password has been created, you will be taken to the login screen. On this screen you may want to bookmark page or save the web address for future reference. (SchneiderDowns.portal.tamaracinc.com) Please enter your username and password. Your username is the email address where the portal invitation was sent.



The image shows a login screen for the Schneider Downs Wealth Management Client Portal. At the top is the company logo. Below it are two input fields: 'Email Address' with an eye icon and 'Password' with a lock icon. A 'Remember me on this computer' checkbox is below the password field. A blue 'SIGN IN' button is centered below the inputs. At the bottom, there is a link: 'Did you forget your password? [Recover it here.](#)'

Step 4: The first time you log in, you will be required to accept the terms of use. Click “I agree at the bottom right of the screen.

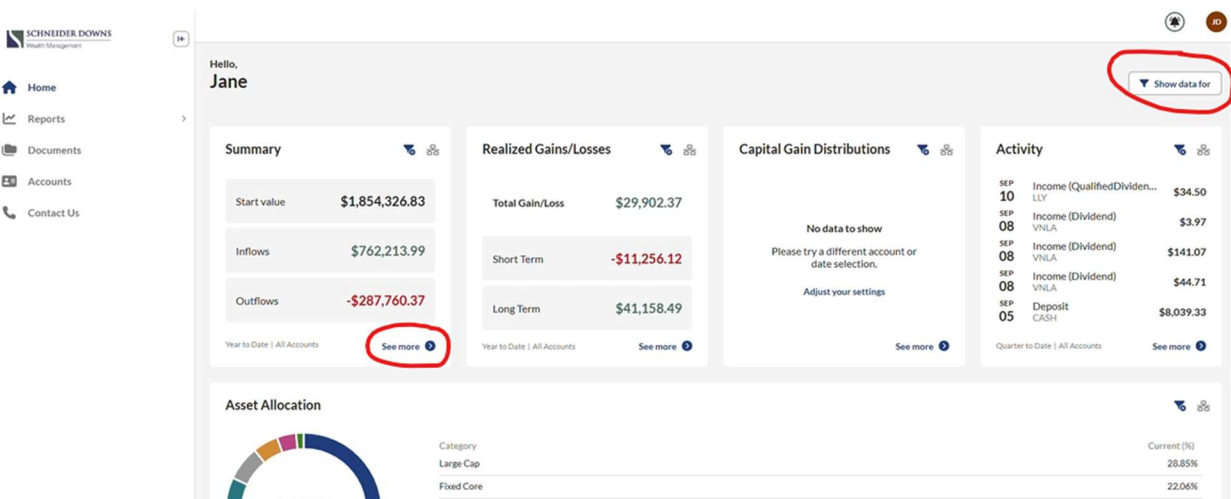
Continued on the next page

Now that you are in the portal, let's go over some key features.

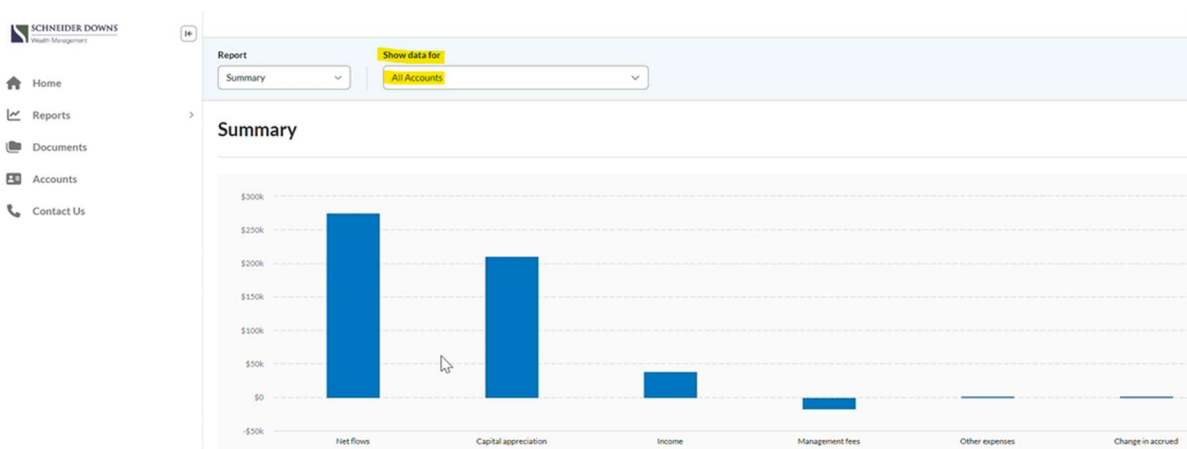
Landing Page

The Home screen is made up of different tiles to give you a quick overview of your entire portfolio. Each of the tiles can be expanded to the full report by clicking the “See More” button at the bottom right of each tile.

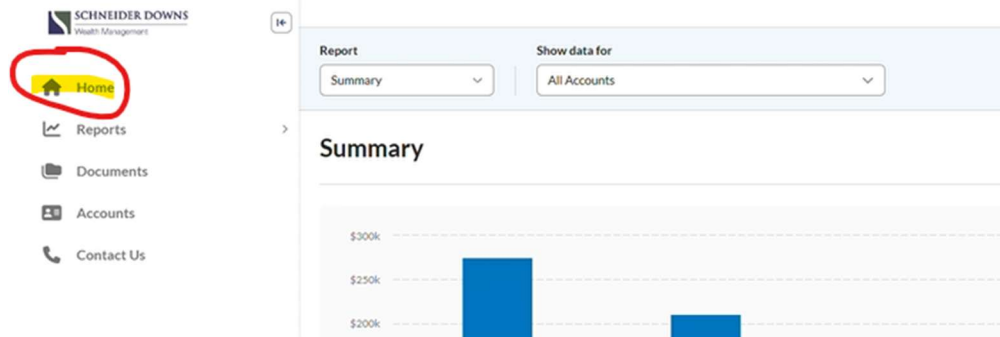
On the home screen you can change the view to only see a particular account, instead of your entire portfolio. To do this click the “Show data for” button on the top right of the screen. This will open a drop-down menu for you to choose the account you want to view.



As mentioned, if you click the “See More” button on a tile, it will open the full report for that tile. You can view the report on the entire portfolio or update the view to one singular account by clicking the “Show data for” dropdown.

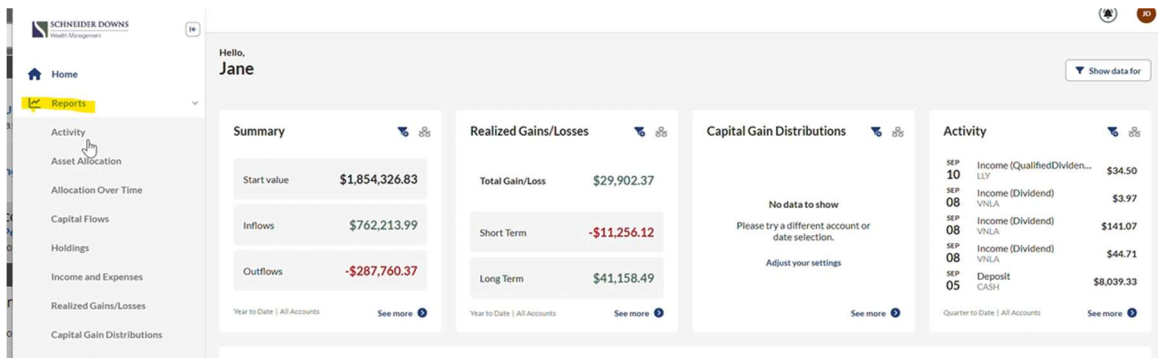


At any point if you want to get back to the main page of the portal, click the Home button on the top left of the page.

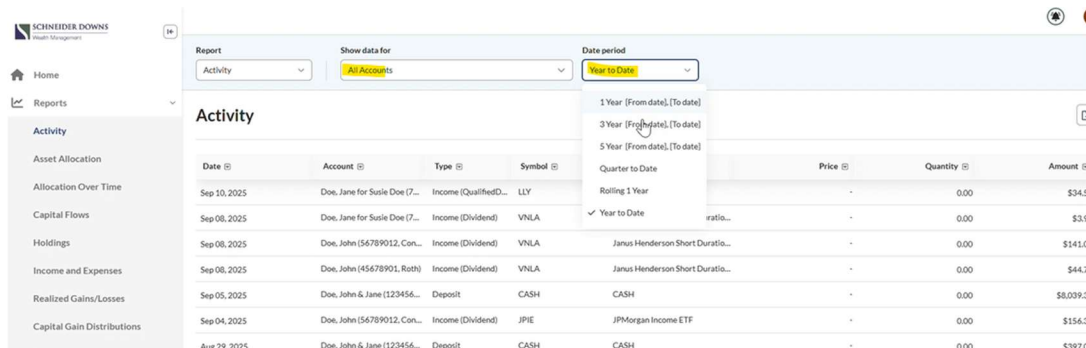


Reports

The Reports tab will expand allowing you to view the many reports we have made available to you. Click on a report you would like to view.

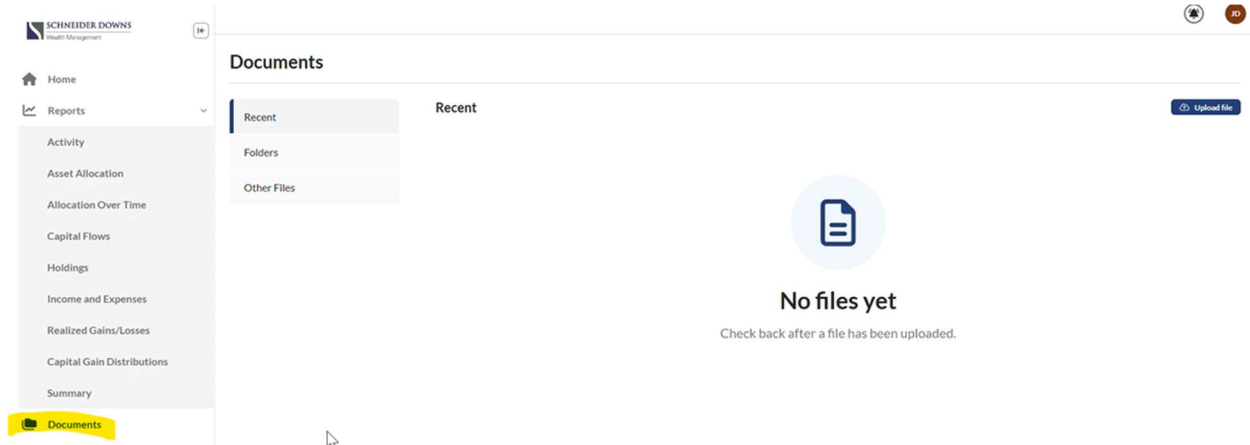


Inside the report you will again have the option of choosing to view the report on the entire set of accounts we manage for you or choose to drill down into specific accounts. You can also view data on different date ranges.

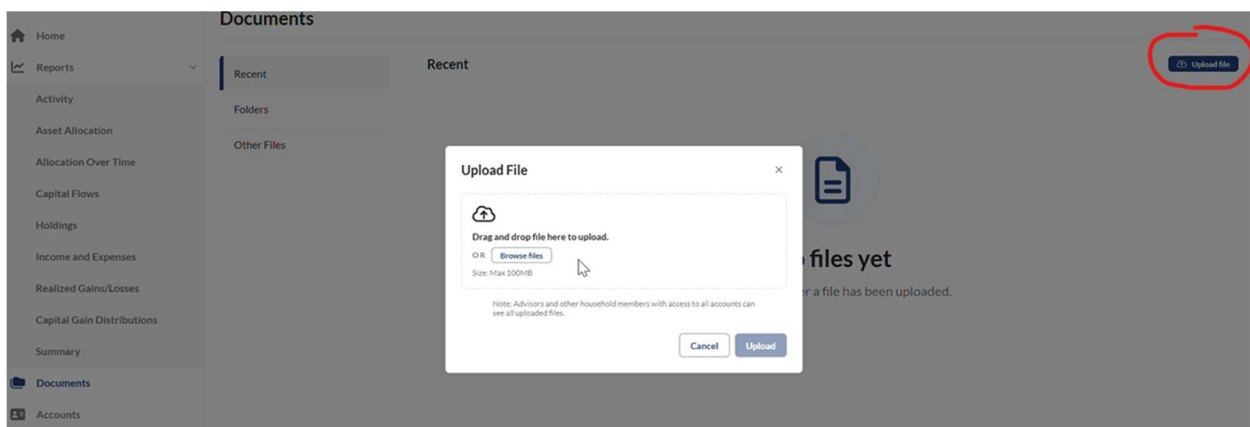


Document Vault

The vault is found by clicking on the Documents tab. This is where you will find documents that your advisor shares with you, including your quarterly report and invoices.

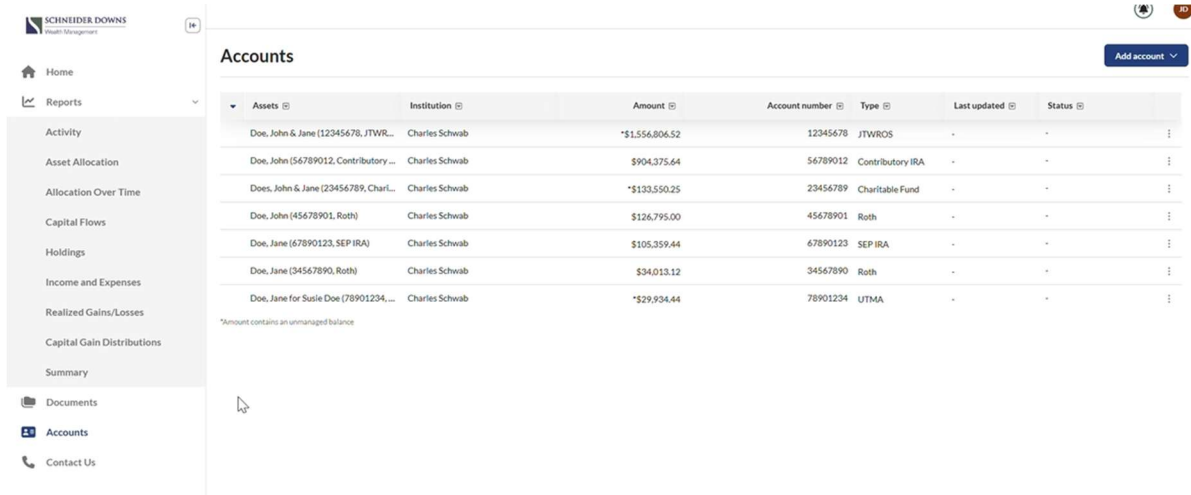


The vault also allows you to securely upload files to us. Clicking the Upload file button at the top right of the screen will open a pop-up window. Here you can choose to either drag/drop a file into the window or click “Browse files” to search your computer for the file you want to share. Click “Upload” and you should now see the document in the vault.



Accounts

The Accounts tab simply shows a list of accounts we manage for you at Schneider Downs Wealth Management.



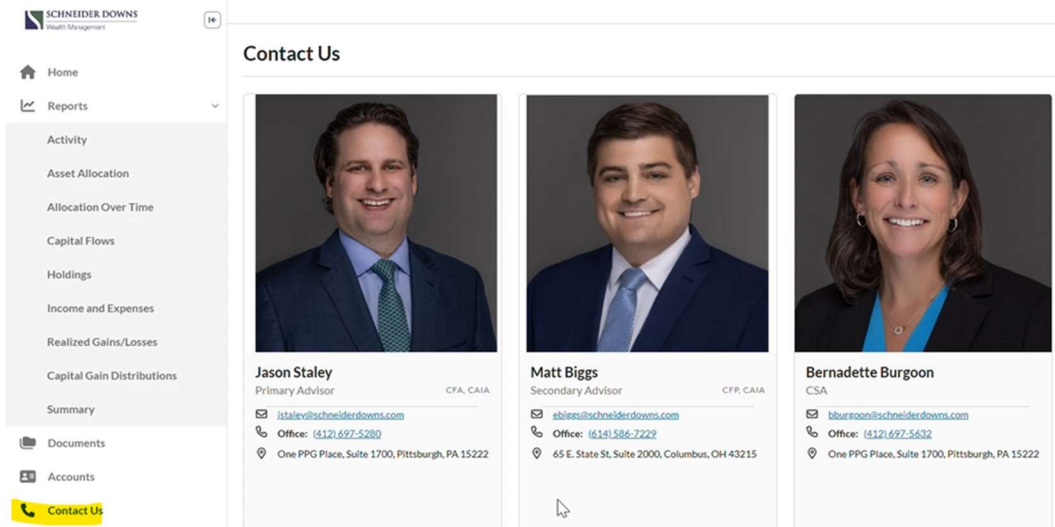
The screenshot shows the 'Accounts' tab in the Client Portal. On the left is a navigation menu with options: Home, Reports, Activity, Asset Allocation, Allocation Over Time, Capital Flows, Holdings, Income and Expenses, Realized Gains/Losses, Capital Gain Distributions, Summary, Documents, Accounts, and Contact Us. The 'Accounts' tab is selected. The main content area displays a table of accounts managed by Charles Schwab.

Assets	Institution	Amount	Account number	Type	Last updated	Status
Doe, John & Jane (12345678, JTWR...	Charles Schwab	*\$1,556,806.52	12345678	JTWR05	-	-
Doe, John (56789012, Contributory ...	Charles Schwab	\$904,375.64	56789012	Contributory IRA	-	-
Doe, John & Jane (23456789, Charl...	Charles Schwab	*\$133,550.25	23456789	Charitable Fund	-	-
Doe, John (45678901, Roth)	Charles Schwab	\$126,795.00	45678901	Roth	-	-
Doe, Jane (67890123, SEP IRA)	Charles Schwab	\$105,359.44	67890123	SEP IRA	-	-
Doe, Jane (34567890, Roth)	Charles Schwab	\$34,013.12	34567890	Roth	-	-
Doe, Jane for Susie Doe (78901234, ...	Charles Schwab	*\$29,934.44	78901234	UTMA	-	-

*Amount contains an unmanaged balance

Contact Us

The Contact Us tab shows you your dedicated Client Service Team and their contact information.



The screenshot shows the 'Contact Us' tab in the Client Portal. The navigation menu on the left is the same as in the Accounts tab, but the 'Contact Us' option is highlighted. The main content area displays three advisors with their photos, names, titles, and contact information.



Jason Staley
Primary Advisor CFA, CAIA
jstaley@schneiderdowns.com
Office: (412) 697-5280
One PPG Place, Suite 1700, Pittsburgh, PA 15222



Matt Biggs
Secondary Advisor CFP, CAIA
ebiggs@schneiderdowns.com
Office: (614) 586-7229
65 E. State St, Suite 2000, Columbus, OH 43215



Bernadette Burgoon
CSA
bburgoon@schneiderdowns.com
Office: (412) 697-5632
One PPG Place, Suite 1700, Pittsburgh, PA 15222

If you have any questions regarding your portal, please contact your Client Service Associate (CSA) and they will be happy to answer any questions you may have.