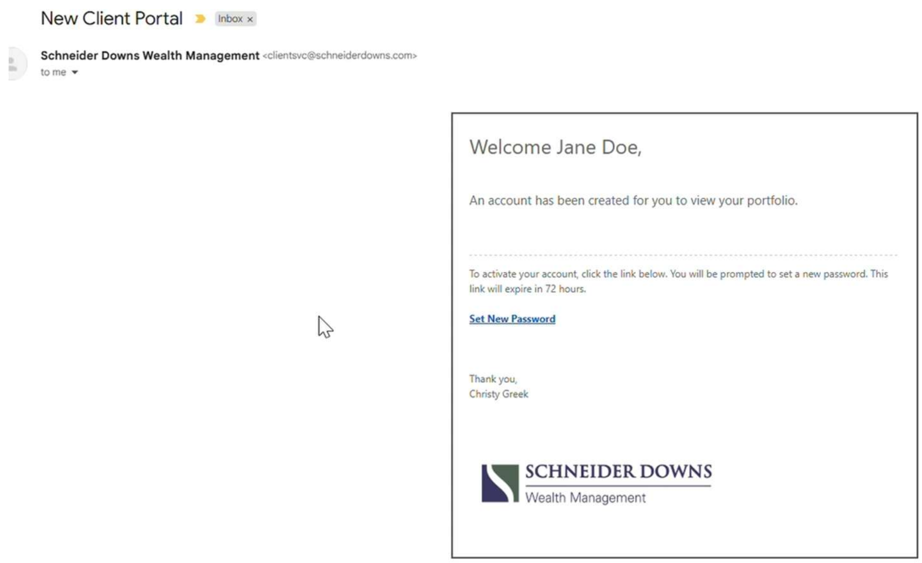
SCHNEIDER DOWNS
Wealth Management

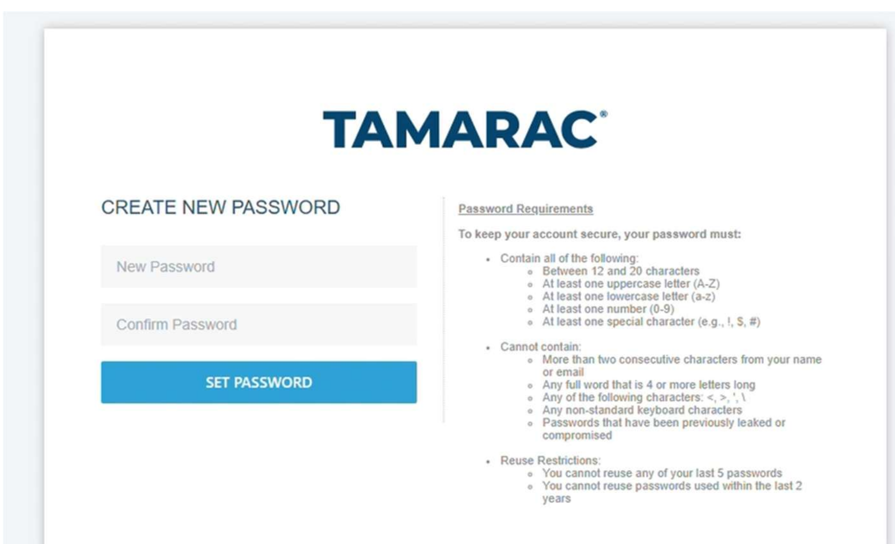
Client Portal Instructions & Overview

Logging in for the first time

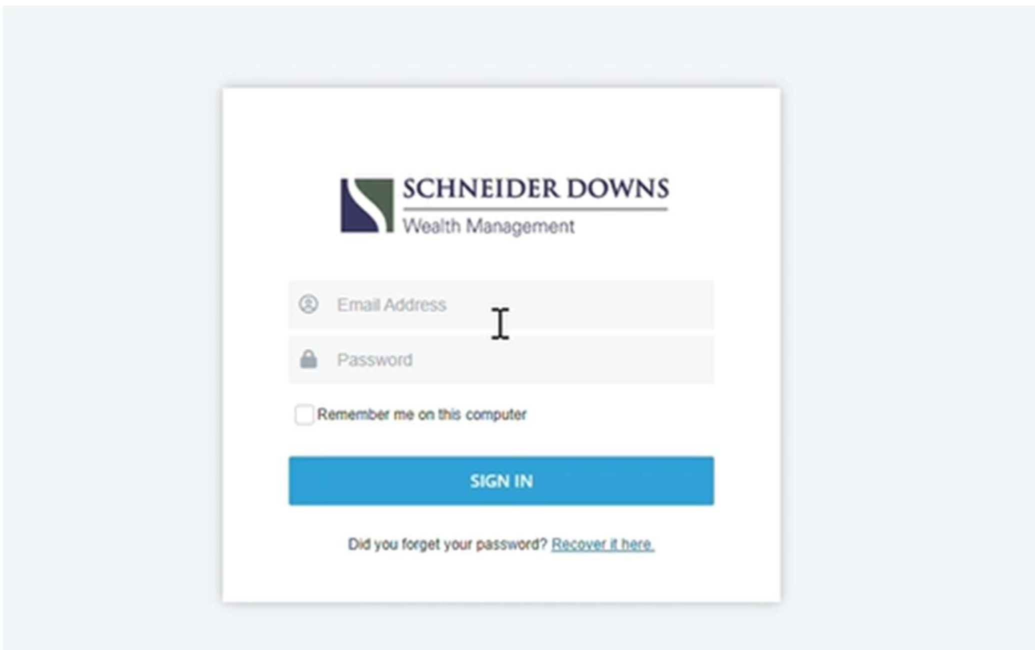
Step One: Click the Link in the portal invitation email you received. The email should look similar to the one below and the sender will be clientsvc@schneiderdowns.com



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.



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.



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.

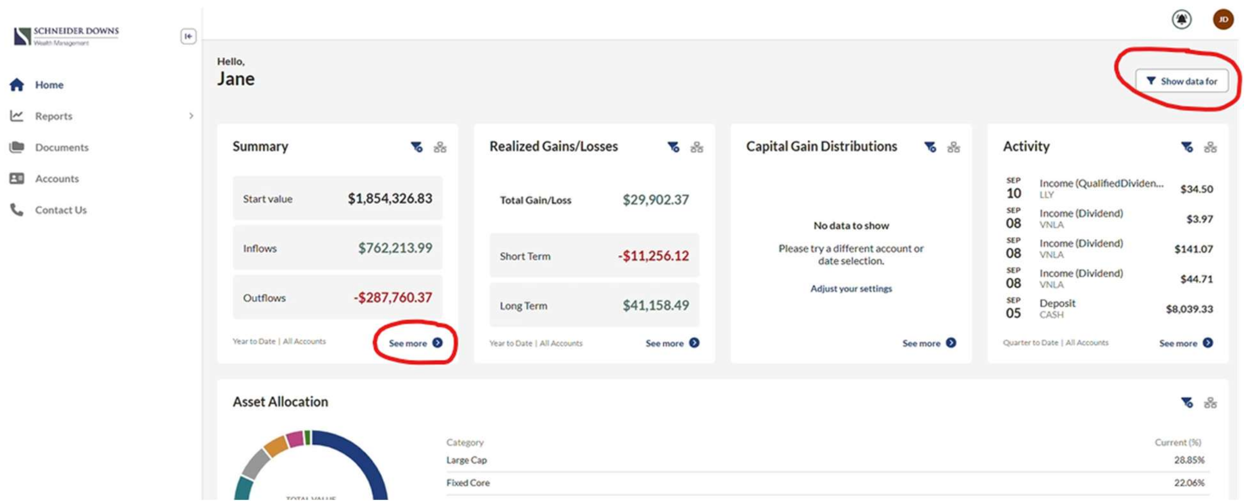
Continued on the next page

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

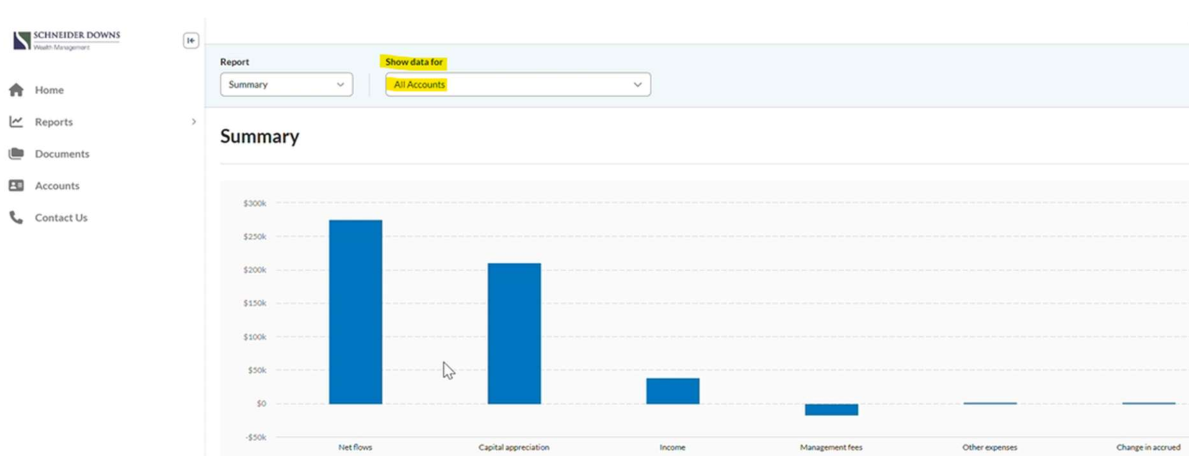
Landing Page

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.

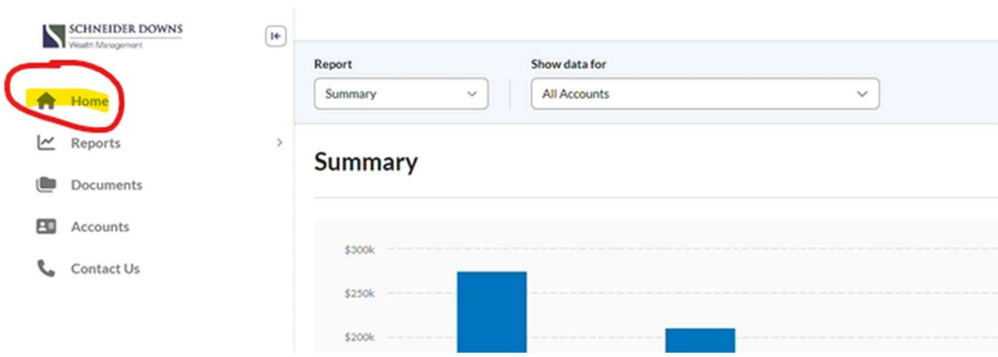
On the home screen you can change the view to only see a particular account, instead of your entire portfolio. To do this click the "Show data for" button on the top right of the screen. This will open a drop-down menu for you to choose the account you want to view.



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.

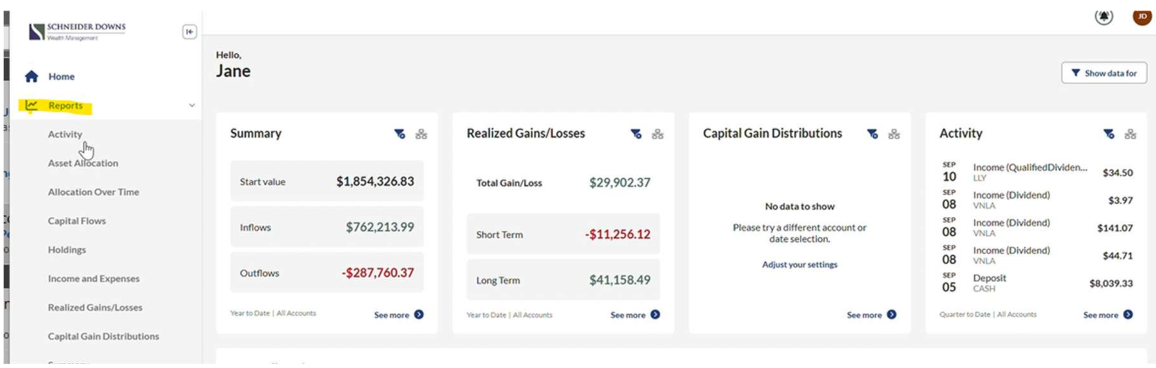


At any point if you want to get back to the main page of the portal, click the Home button on the top left of the page.

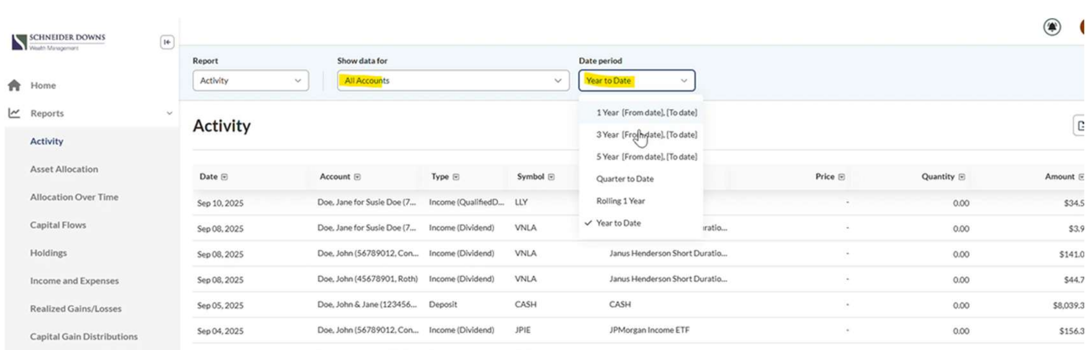


Reports

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.

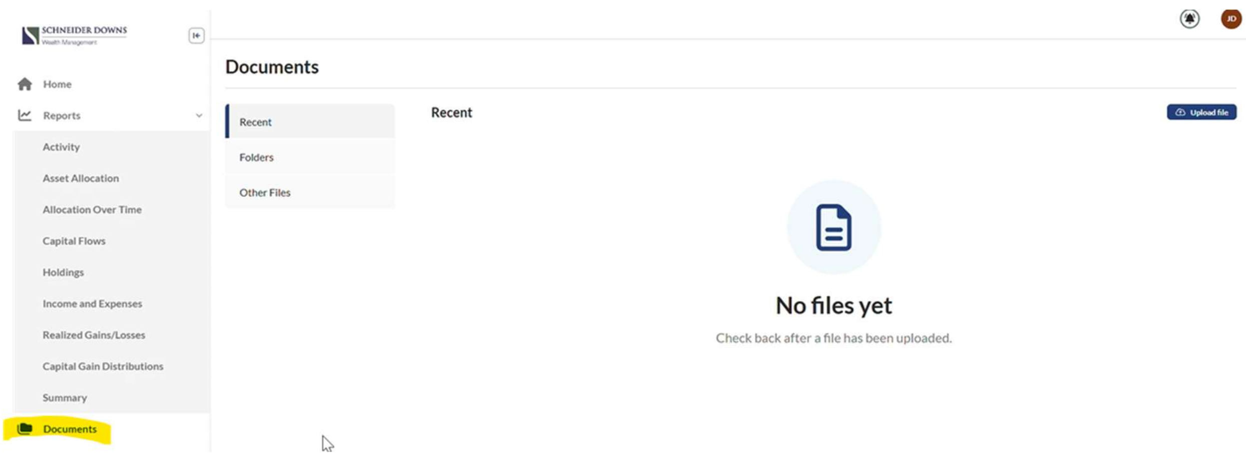


Inside the report you will again have the option of choosing to view the report on the entire set of accounts we manage for you or choose to drill down into specific accounts. You can also view data on different date ranges.

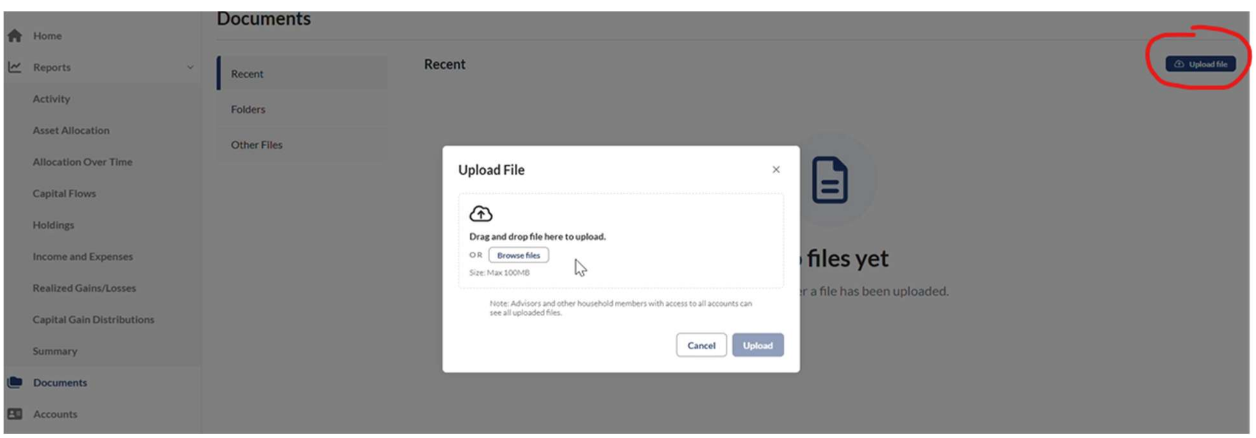


Document Vault

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.



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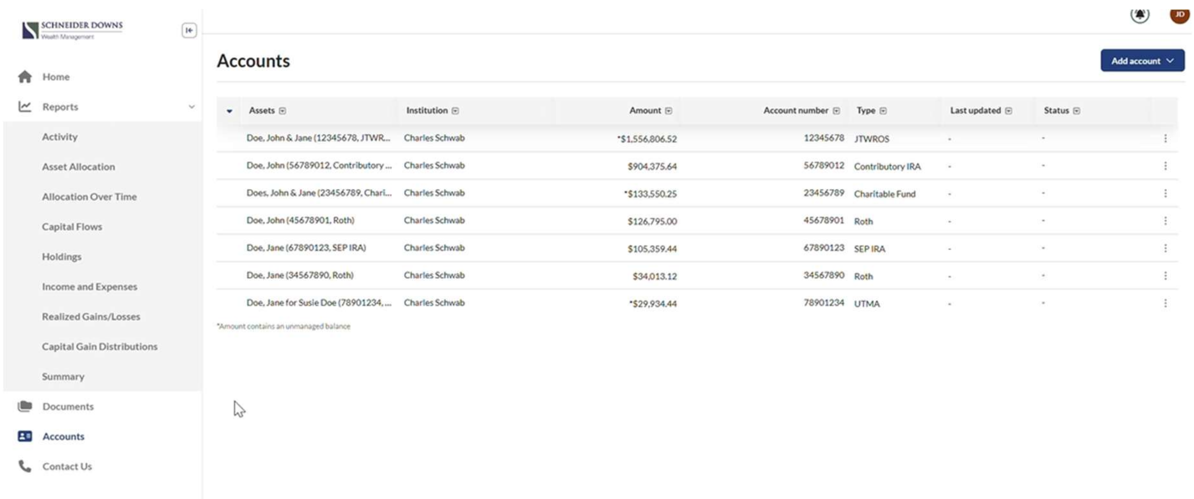
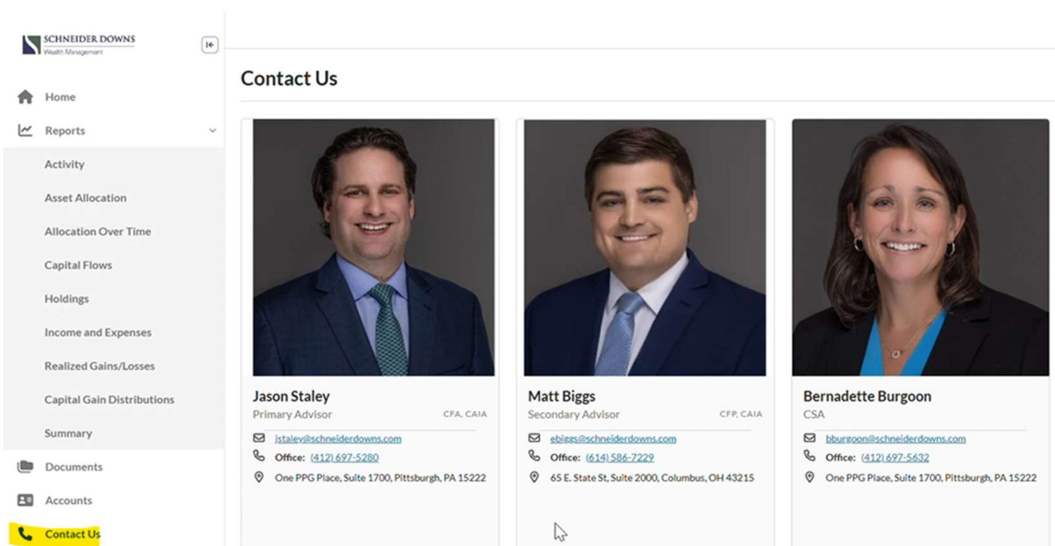
Accounts

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



Contact Us

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



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.