Co|Create
Financial

YOUR PORTAL OVERVIEW

& the CoCreate Finance App

Welcome to your CoCreate financial portal! The portal includes your financial plans, performance, documents, news, and advisor communication in one consolidated experience. This experience empowers you to understand your whole financial picture and puts your financial advisor only one click away for guidance and help.

This guide walks through the portal's features and provides tips on how to get the most out of the online experience.

Have questions?

Contact us:

Accessing Your Account

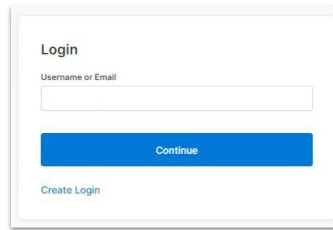
There are two ways you can access your account:

- Navigate to the website address provided by your advisor.
- Download the **CoCreate Finance** mobile app from the Apple or Android app store. Once complete, the mobile app will be accessible on your mobile device.

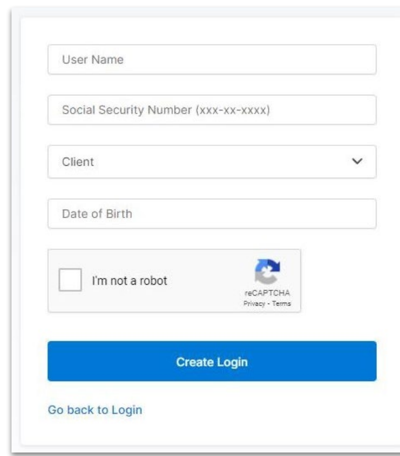
Please note, two-Factor Authentication (2FA) is mandatory when logging into the client portal. If you have questions regarding this, please contact your advisor to get additional information.

Create Login

If this is your first time logging in and you were instructed to create your login, click **Create Login** in the bottom left corner of the login page. On the following prompt:



- Enter your email address as your username
- Input required personal information in the additional fields
- Select the I'm not a robot box, and click Create Login
- An email to create a password will be sent to the email we have on file for your household. If you do not see this email, contact your advisor.



Create Password

Click the link in the email to set your password. Please note, this link is temporary and expires after a short time.

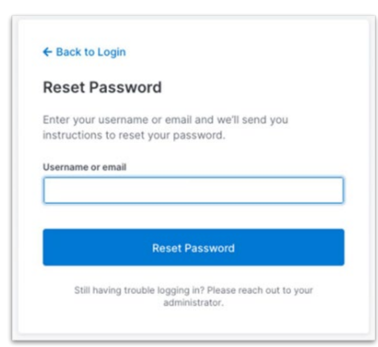
- After clicking the link, enter a new password. Password requirements are listed on this page.
- Confirm the password by repeating it in the second field and click Reset Password.
- Then, proceed with logging in using your new password.

Reset Your Password

On the login page, enter your Username and click Continue. On the next page click **Forgot password?** in the bottom left corner. On the next prompt, enter your Username and click **Reset Password**. An email is sent to the email address that is associated with your household.

Then, follow the instructions above in the Create Password section of this document.

Password Requirements



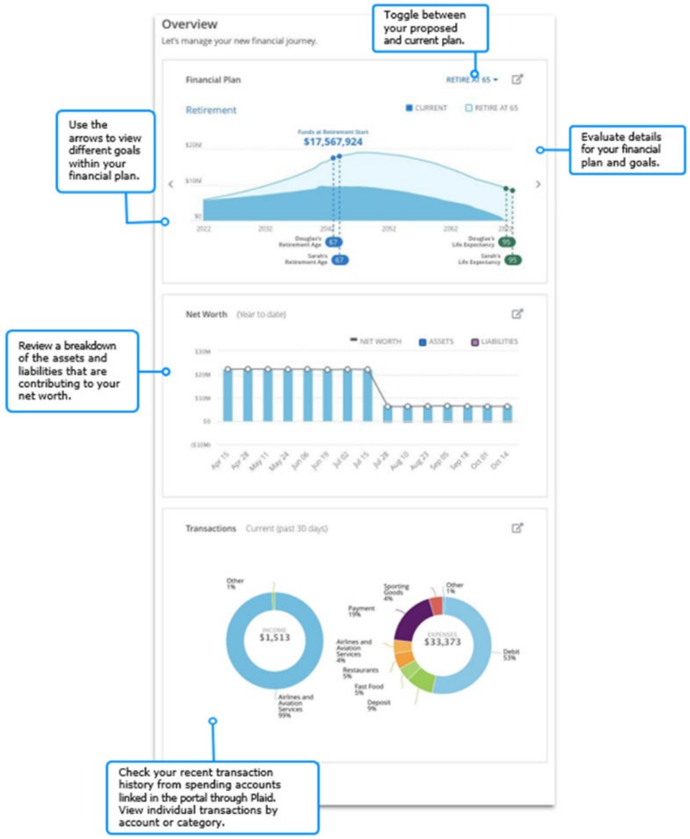
- Has an uppercase and lowercase letter
- Has a number or special character
- Has 10 or more characters
- Does not contain date-related words
- Does not use a variation of 'password', 'Orion', or 'advisor'
- Does not use your User ID
- Does not use your name or email address
- Cannot be a previous password used for Orion Connect
- Cannot use a seasonal word or current year

If you experience issues with your username or password being incorrect, please contact your advisor.

Client Overview

Quickly and easily see some of the most important parts of your financial story, including your net worth, transactions and progress on your financial plan.

If accessing your portal online, your homepage will resemble the following:

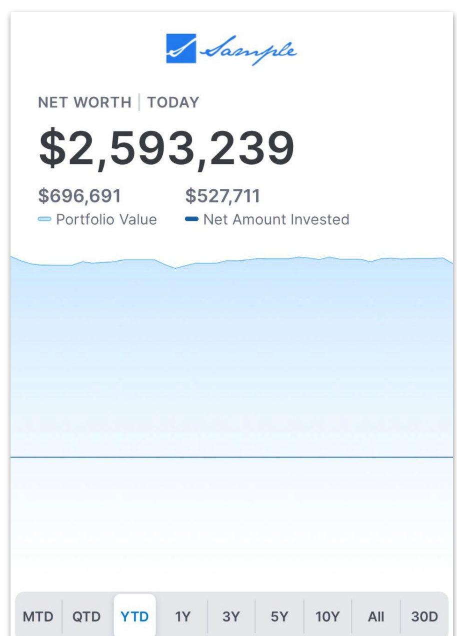


Mobile App Overview Tab

The Overview Tab is the landing page for the mobile app; use the interactive graph to view your Portfolio Value and Net Amount Invested.

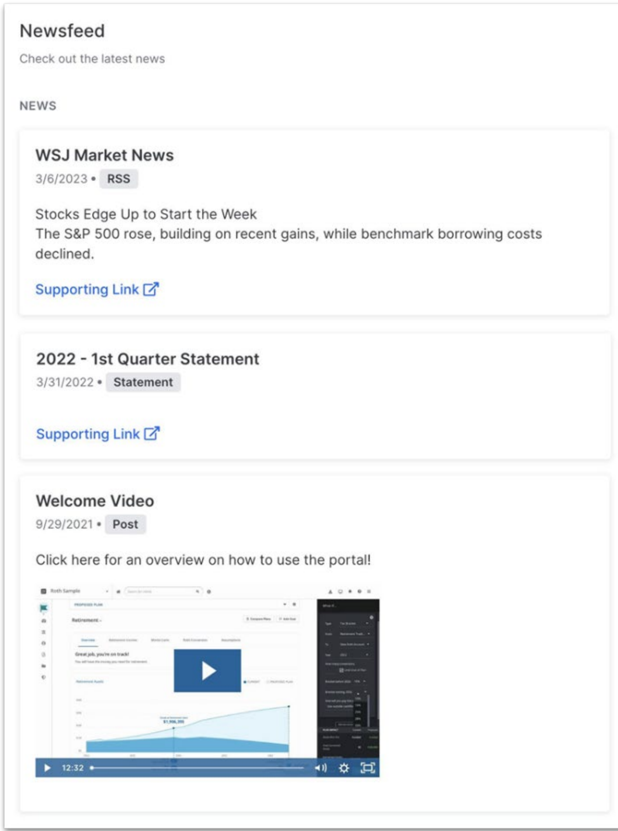
Slide your finger across the graph to view data for a specific date.

Use the built-in date range buttons to apply a select time period.

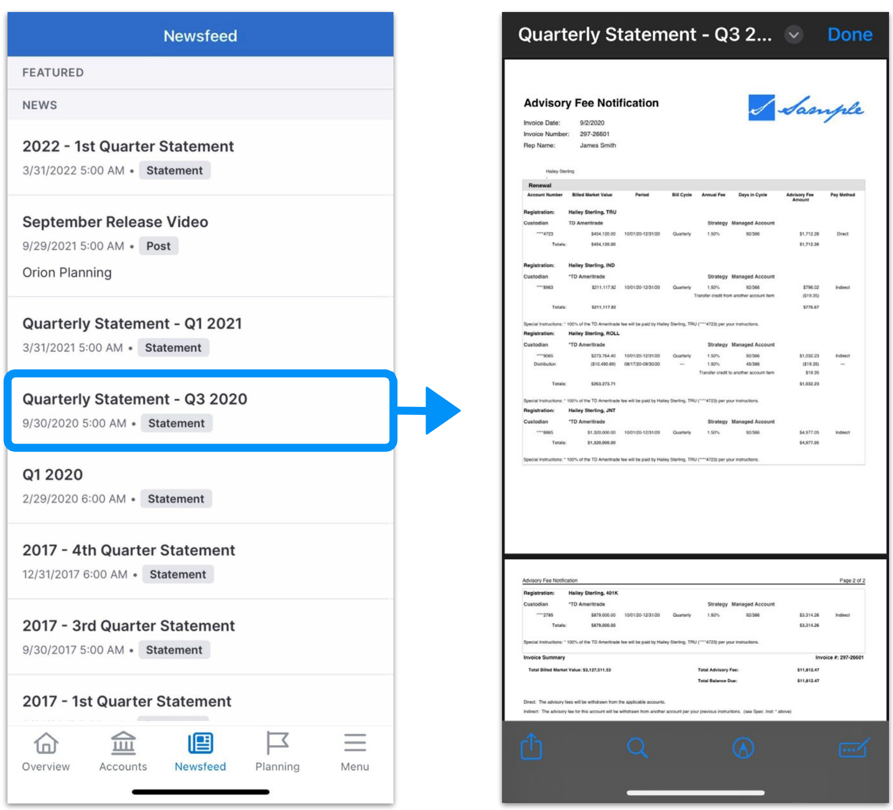


Newsfeed

Stay connected wherever you are using the Newsfeed Tab. Review posts and updates from your advisor, download and review portfolio statements, and more.

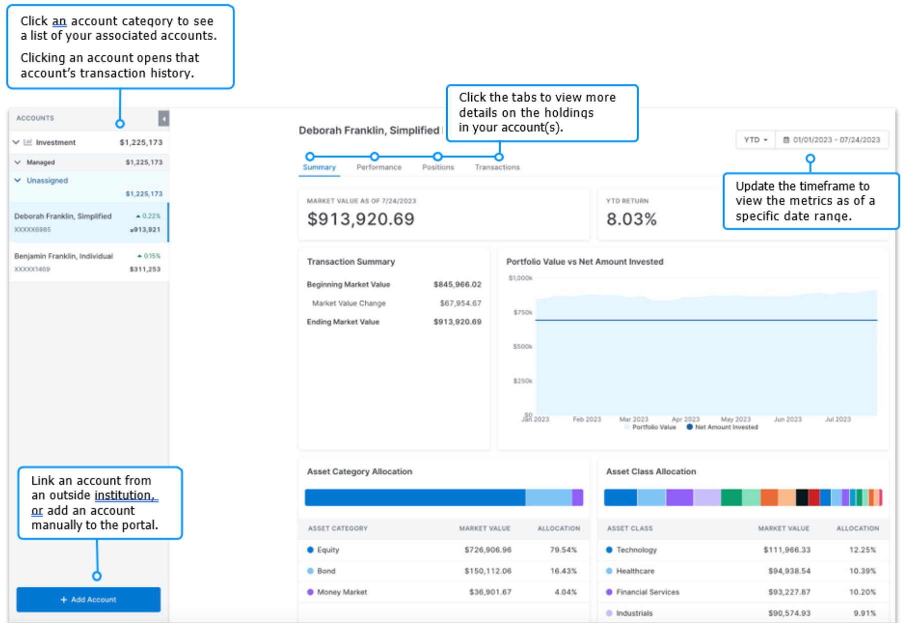


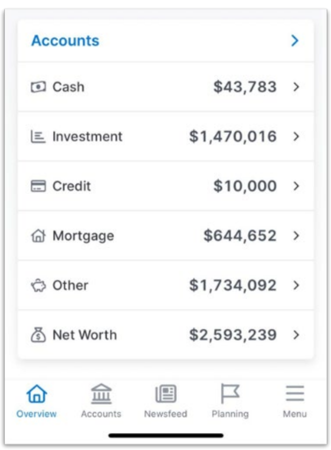
When viewing the newsfeed through the mobile app, you can expect a view more like this:



Personal Finances Summary

Dive deeper to further understand what you have and how it's performing. Check out information for various time frames including your returns, market value, and allocations.





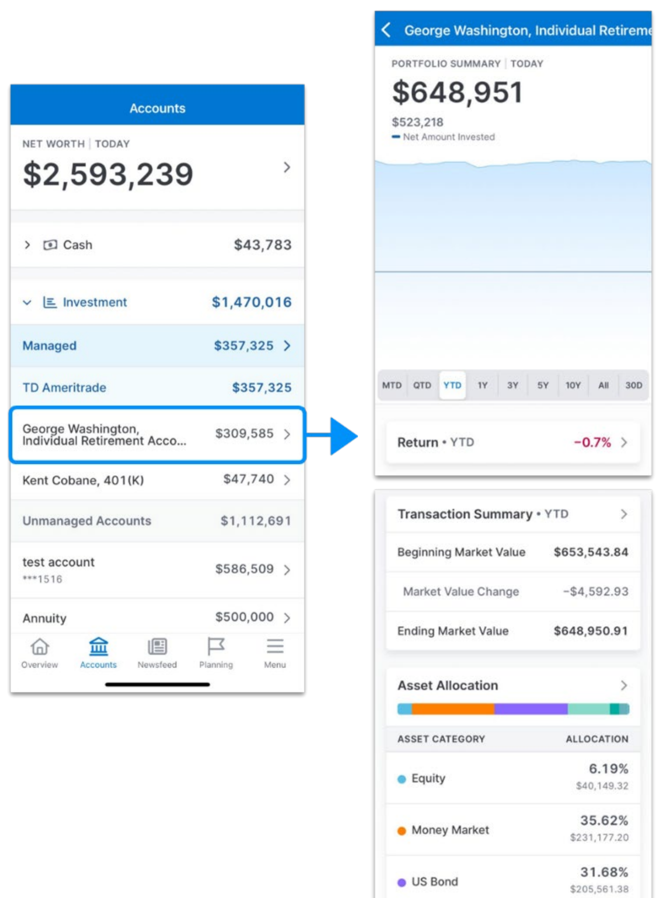
Accounts Summary

When in your mobile app you can review the Accounts summary for the total value of each portfolio category including Cash, Investment, Credit, Net Worth, and more.

Select any of these categories to view more information on the Accounts Tab.

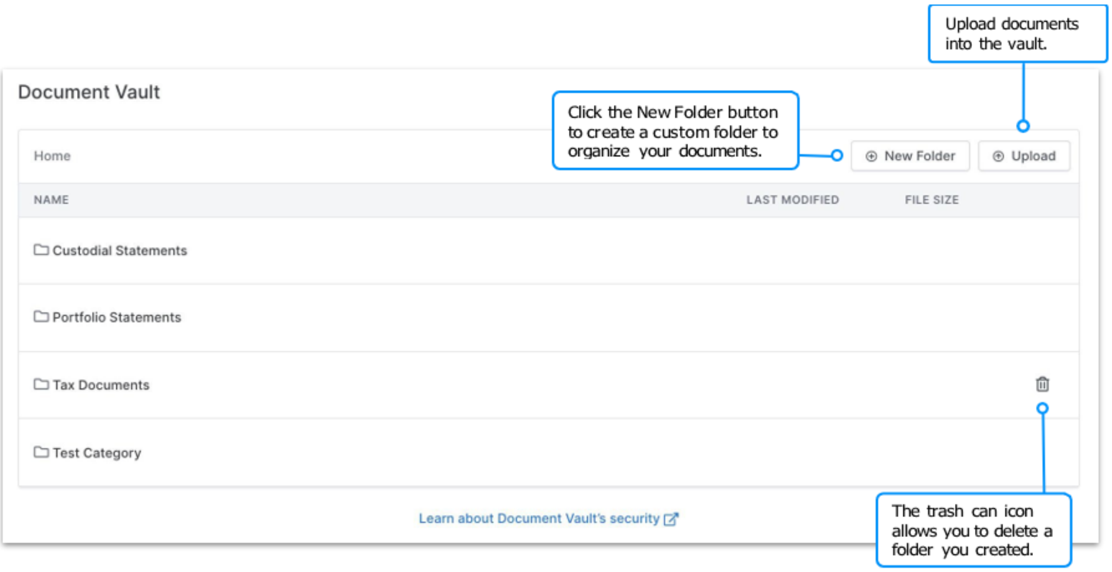
Accounts Tab

Review your portfolio in greater detail using the Accounts Tab. Expand the portfolio categories to see the accounts inside; select any Managed Account to view its portfolio summary, asset allocation, position information, and transaction summary.



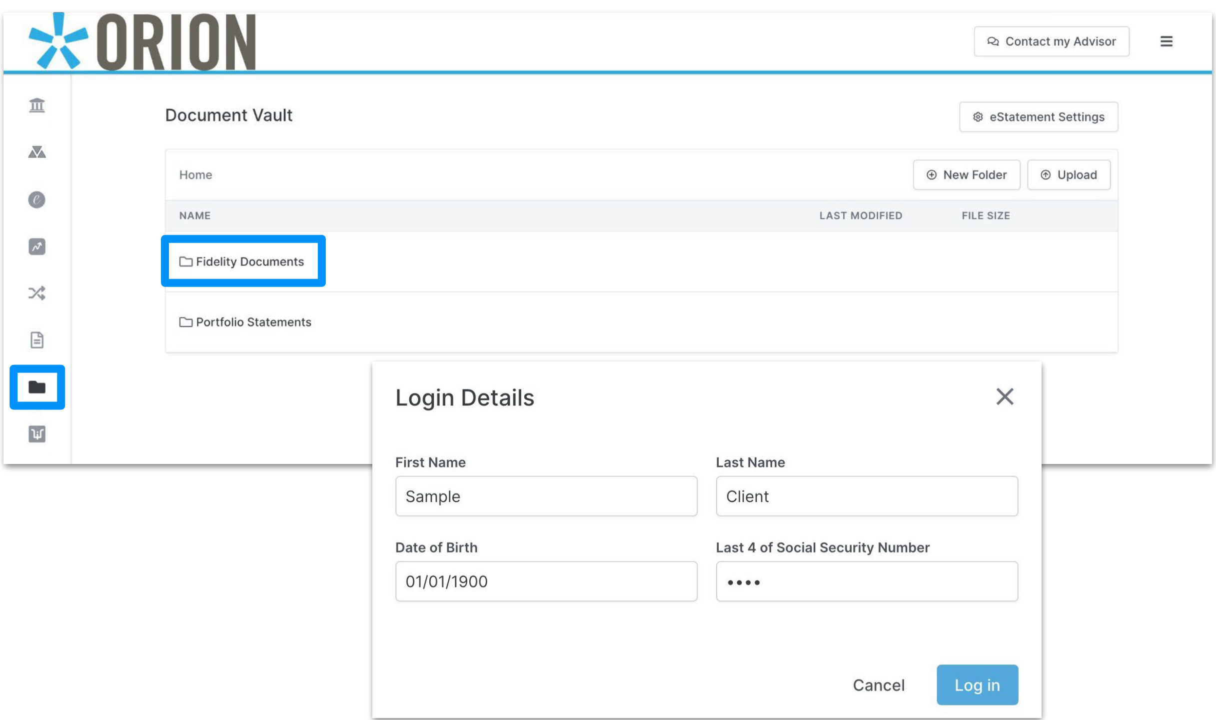
Document Vault

Store and share documents securely with your advisor in the Document Vault. Files that are uploaded into the vault are encrypted in transit, and at rest, in order to provide end-to-end security and protection. Many clients upload tax statements, wills, insurance policies, and more for safe keeping. This is also where your advisor might share important documents with you like your portfolio statements.



Accessing Your Statements

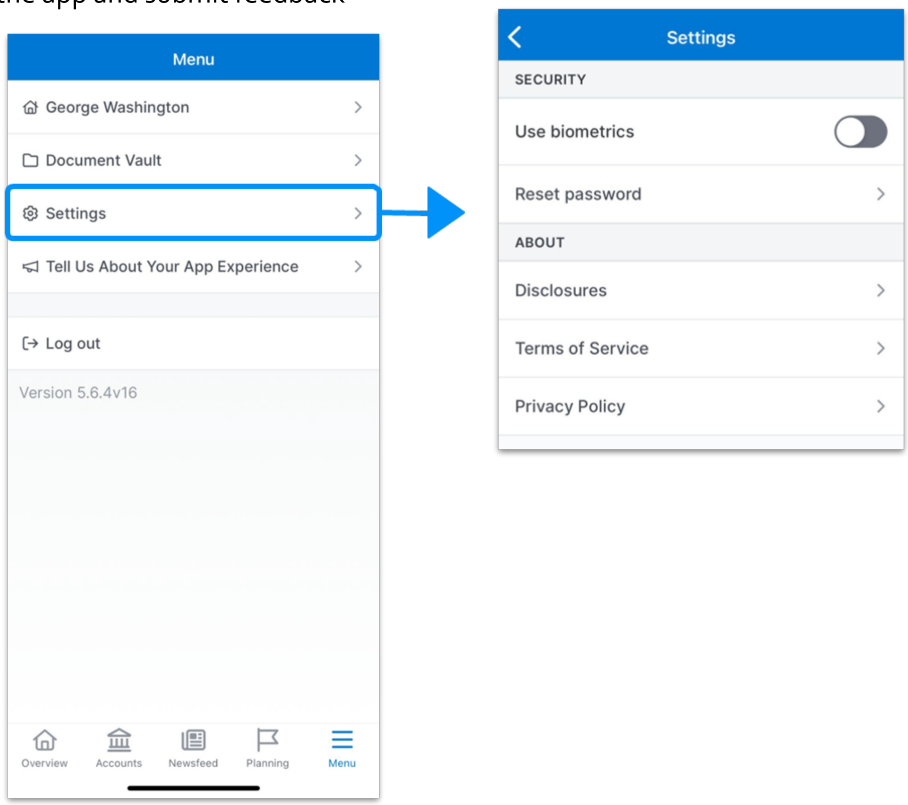
In the client portal, click the **Document Vault** in the left menu. Click the appropriate folder and enter your log in details.



Menu Tab

Set app preferences, access files and disclosures, and submit feedback using the Menu Tab.

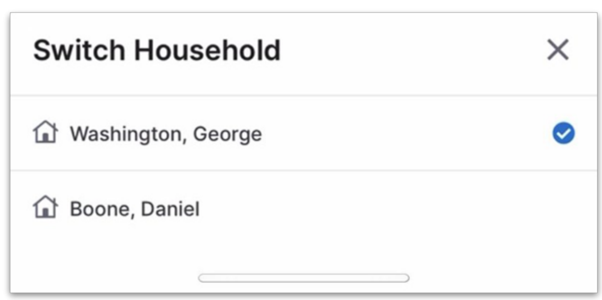
- Toggle between linked households
- View and download files stored in the Document Vault
- Enable biometrics (face recognition/touch ID) or reset your password
- Tell us your experience with the app and submit feedback



Toggle Between Linked Households

Select the row with the household icon to toggle between linked households, if applicable. The Switch Household menu will appear from the bottom of your screen, allowing you to switch profiles seamlessly.

For example, if your personal accounts and business accounts live in separate households, use this feature to switch between which set of accounts you're viewing.



Enable Biometrics

Biometrics depends on your phone interface and whether your device supports face recognition or touch ID. It will not be setup initially as it is defaulted off. Enable it after the first initial login. Best practice is to register with the portal on the web first, prior to accessing the mobile app.

Submit Feedback

Please note the feedback submitted is not an alternative to corresponding with your advisor. Do not provide any personal information when submitting feedback.

Use the **Contact My Advisor** button in the upper right corner of the portal to easily connect with your advisor.