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WEALTH PARTNERS

A HIGHTOWER COMPANY

# CLIENT USER GUIDE

## Well-th View and the Well-th Vault

Original Date Published: 02/4/2022

Date Revised: 06/01/2024

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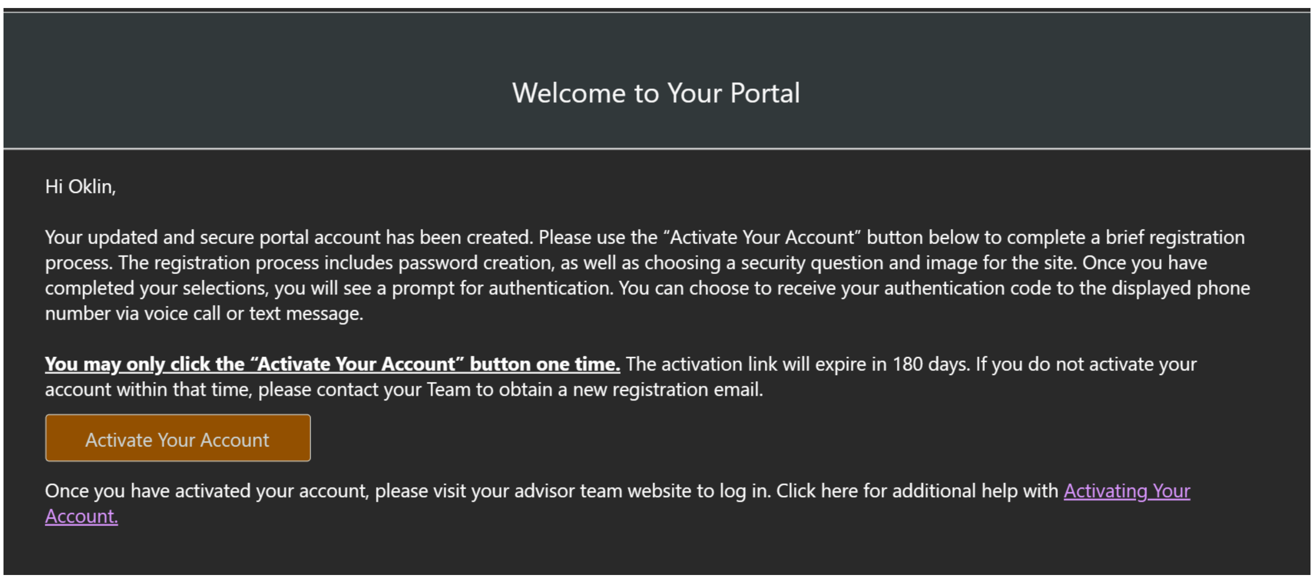
# I. How to Use Well-th View and the Well-th Vault.

Well-th View allows you access to all advisor-recommended portals.

## Initial Activation and registration.

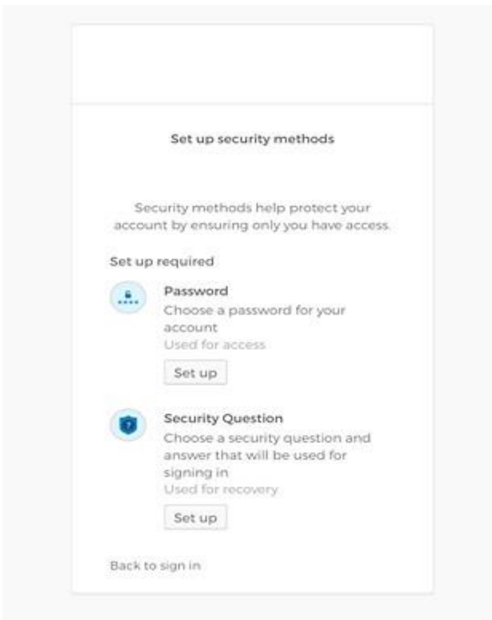
When your advisor provides you with access to Well-th View, you will receive an email from Hightower Advisors. Click on the "Activate Your Account" button.

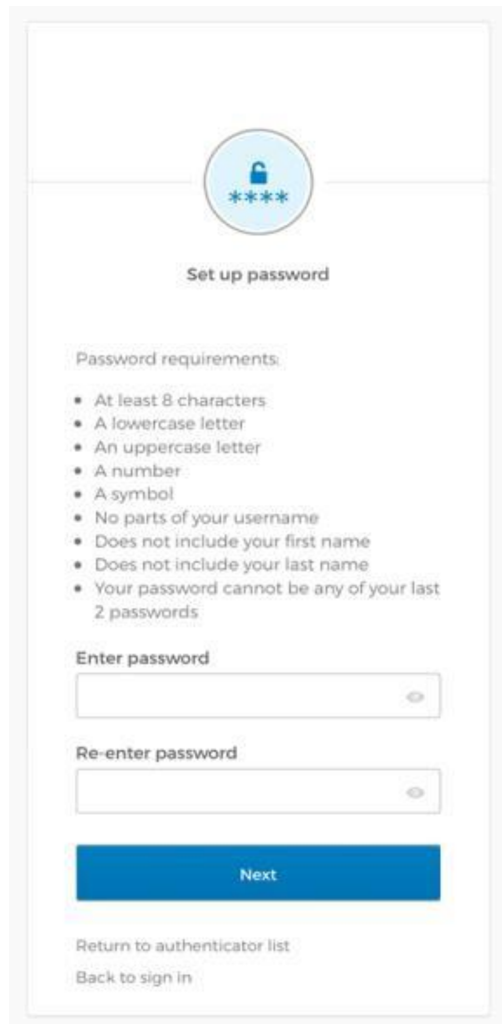
To activate your account, open the "Welcome to Your Portal" email and click on "Activate Your Account" button.



**To select a password**

- Click on the "Set up" box.
- Select a password and press Enter. Note that your password must meet the requirements outlined above the "Enter password" box.
- Re-enter the password you selected in the "Repeat password" box.
- Click “Next”



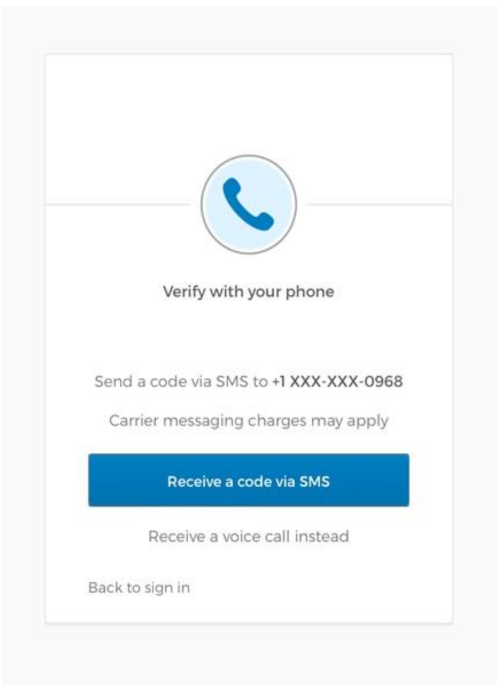



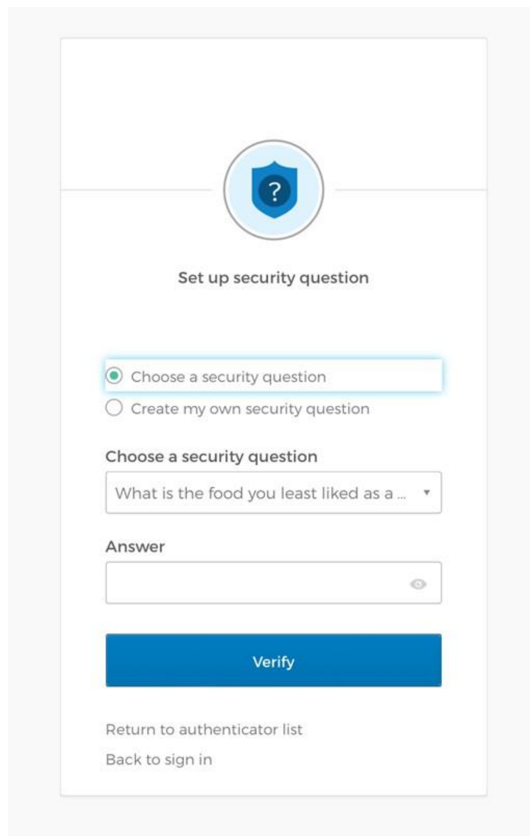
**Multi-Factor Authentication**

- Choose your preferred method for receiving an authentication code: either via SMS text or receive a voice call instead.

**Set up your security question**

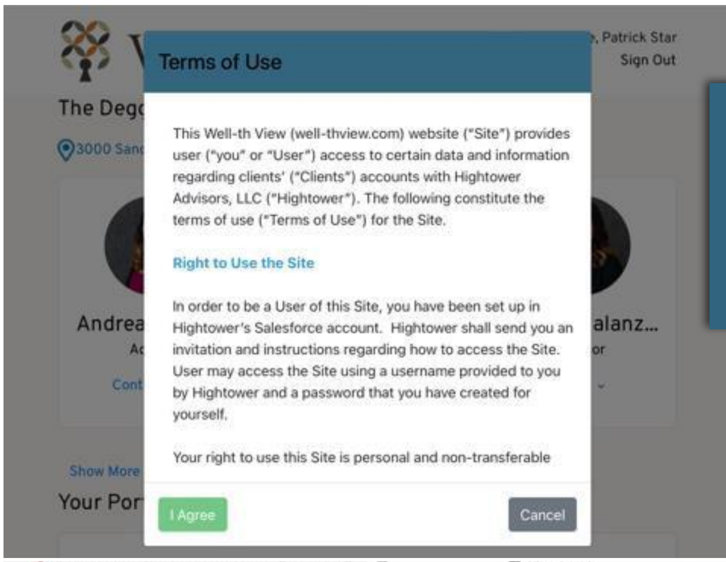
- Choose whether you'd like to select a security question from the dropdown list or create your own question.
- Choose a security question from the dropdown list and enter your answer in the "Answer" box.
- Click “Verify”.



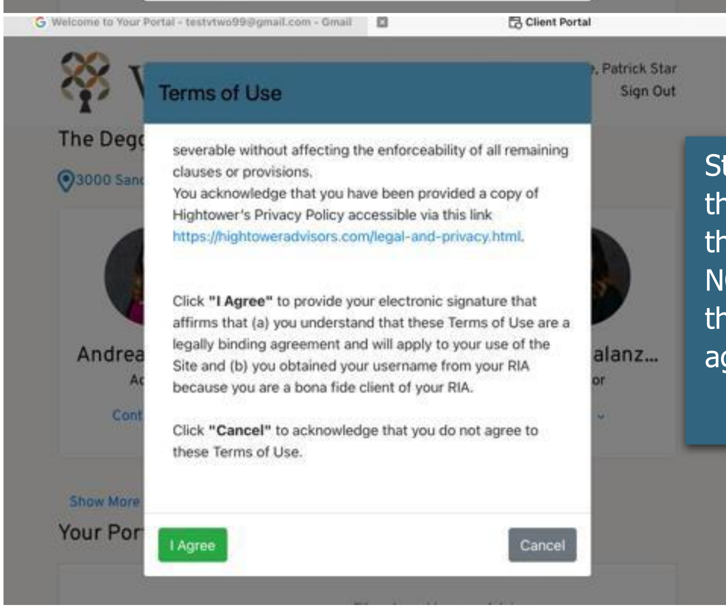



## Terms of Use

On the first login attempt and periodically thereafter, you must acknowledge the "Terms of Use".




Step 1: read the verbiage pressing the down arrow until you reach the end of the Terms of Use.

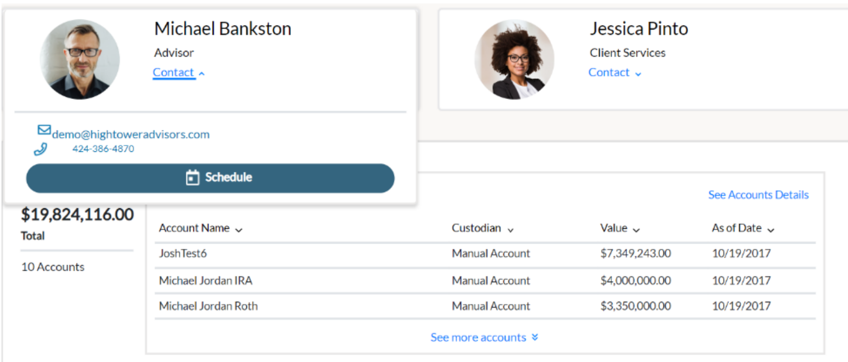



Step 2: if you agree with the Terms of Use, click on the "I Agree" button. NOTE: you may not use the portal unless you agree with these Terms.

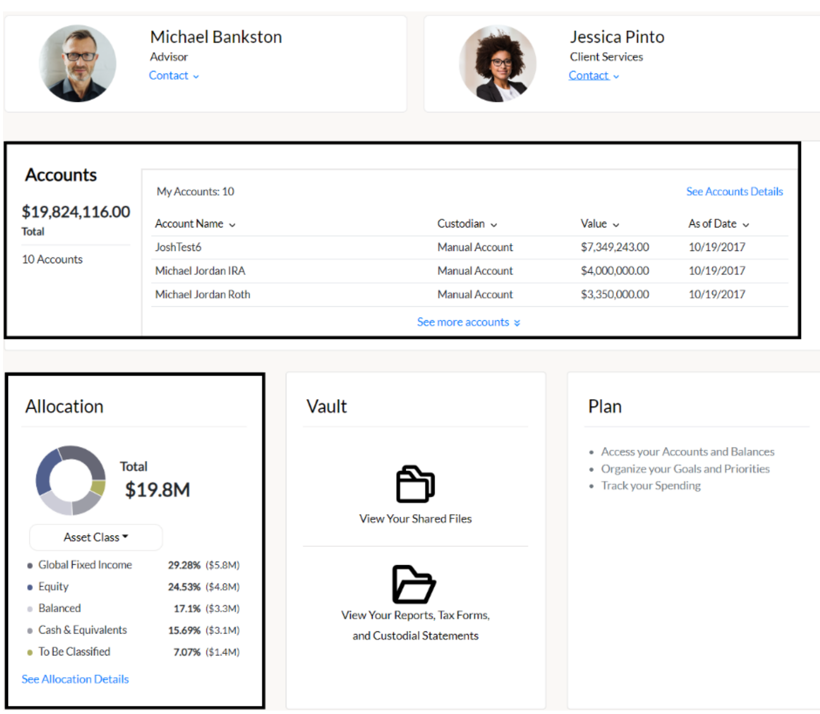
**Well-th View Homepage:**

This is the homepage of Well-th View. Depending on your advisor's configuration, you may have access to the following tiles on your Well-th View homepage.

- Click "Contact" to see information about your advisor team member or to schedule a meeting with your advisor.




**Accounts Tile**
The Accounts Tile presents a comprehensive list of your accounts, showcasing balances and custodians.
**Allocations Tile**
The Allocation Tile provides allocation data of your overall holdings.
**See Accounts Details and See Allocation Details**
Click "See Accounts Details" or "See Allocation Details" to access your Black Diamond portal.



# How to Access the Well-th Vault.

## The Well-th Vault allows you to:

- View and collaborate with your Advisor on documents
- Upload documents for your Advisor team
- View documents and statements
- View tax forms and statements from your custodian

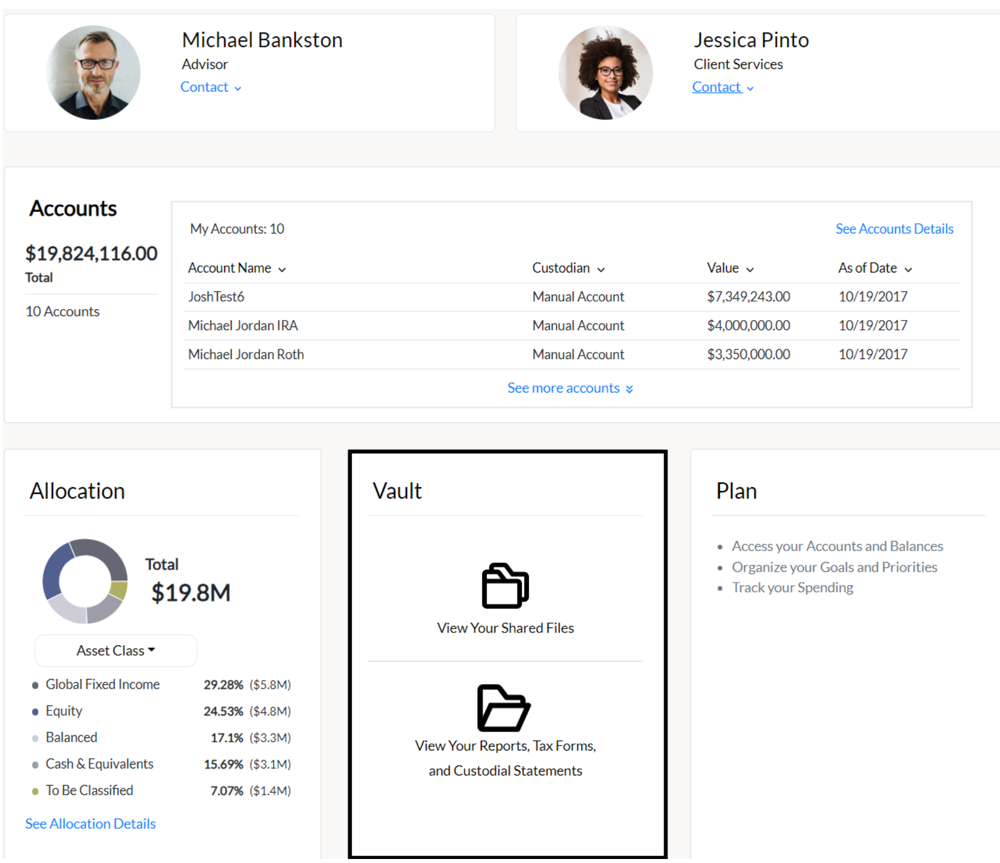
NOTE: if you are using Safari on an iPad, please change the page zoom setting to 85% for the best experience (go to Settings>Safari>Page Zoom- set to 85%).

### View Your Shared Files

Click on "View Your Shared Files" to view your documents and those shared by your advisor.

### View Your Report, Tax Forms and Custodial Statements

Click on "View Your Report, Tax Forms and Custodial Statements" to access your quarterly reports, tax forms and custodial statements.



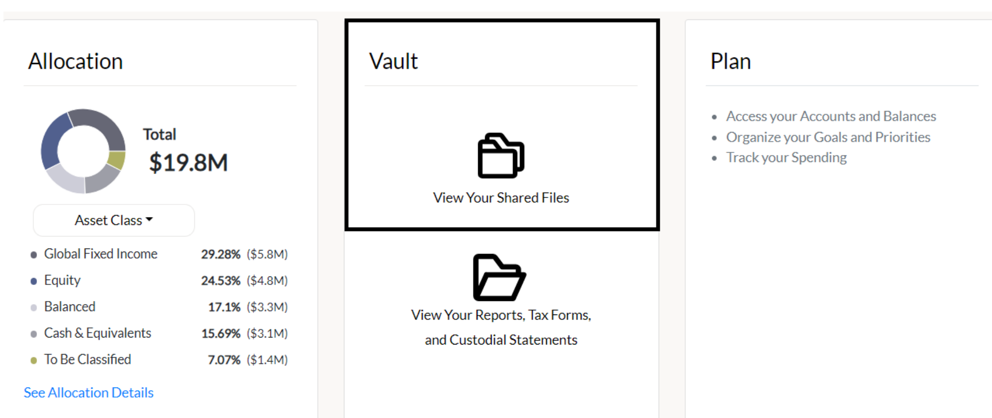
There are multiple ways to access the Vault after the registration has been completed:

1. Type the URL in browser for the portal landing page: https://well-thview.com. Enter credentials; the Well-th View home page is displayed. Click on the Vault portal.

2. Go to your advisor's website and click on the "Access your Account" button.

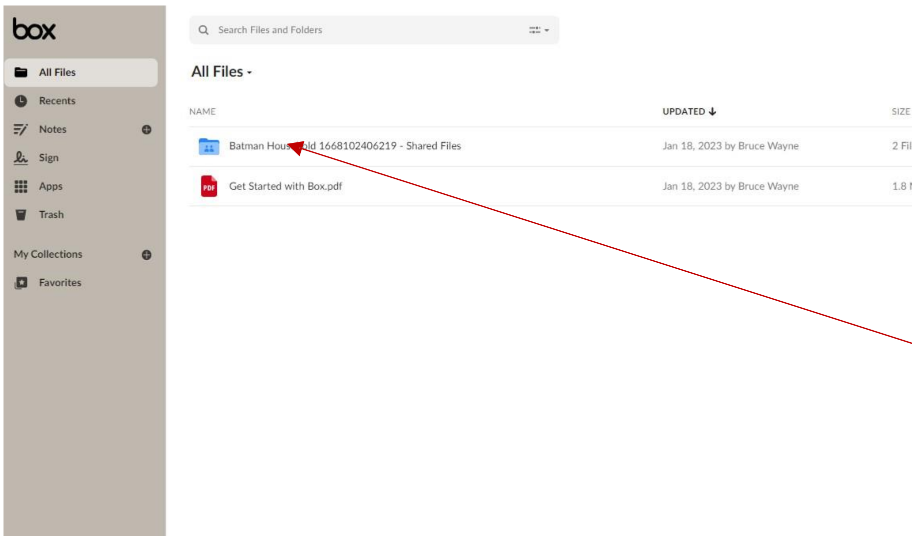
3. Use the Box mobile app. If using a mobile device with the Box mobile app installed, activate the Box app and enter credentials directly.

**View Your Shared Files.**
Click on "View Your Shared Files" to view your documents and those shared by your advisor.

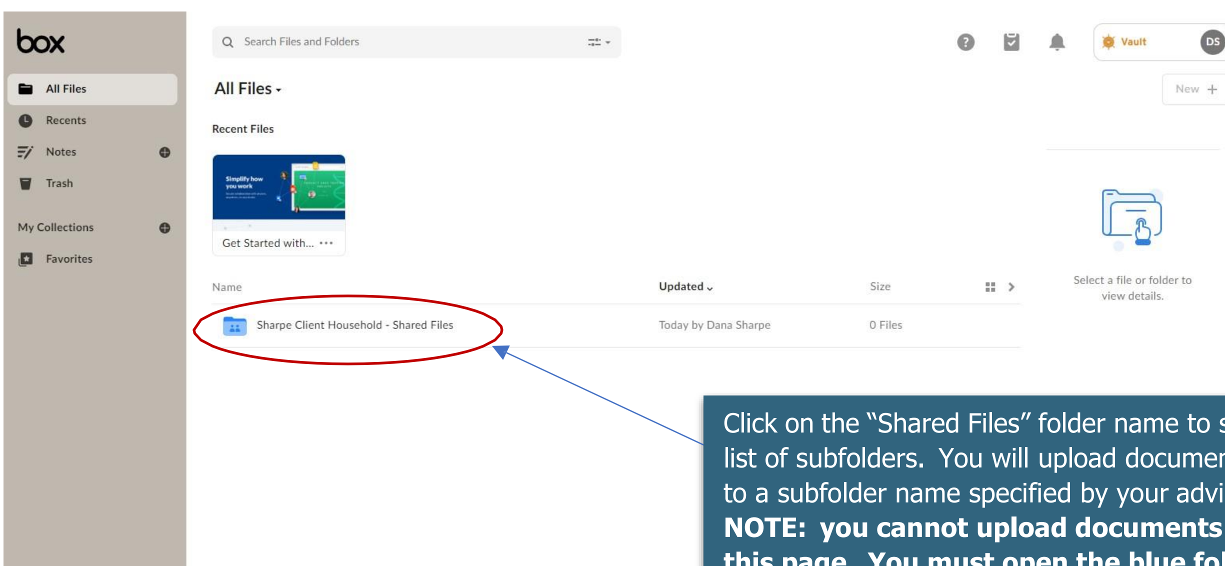


## Share a document with your Advisor.

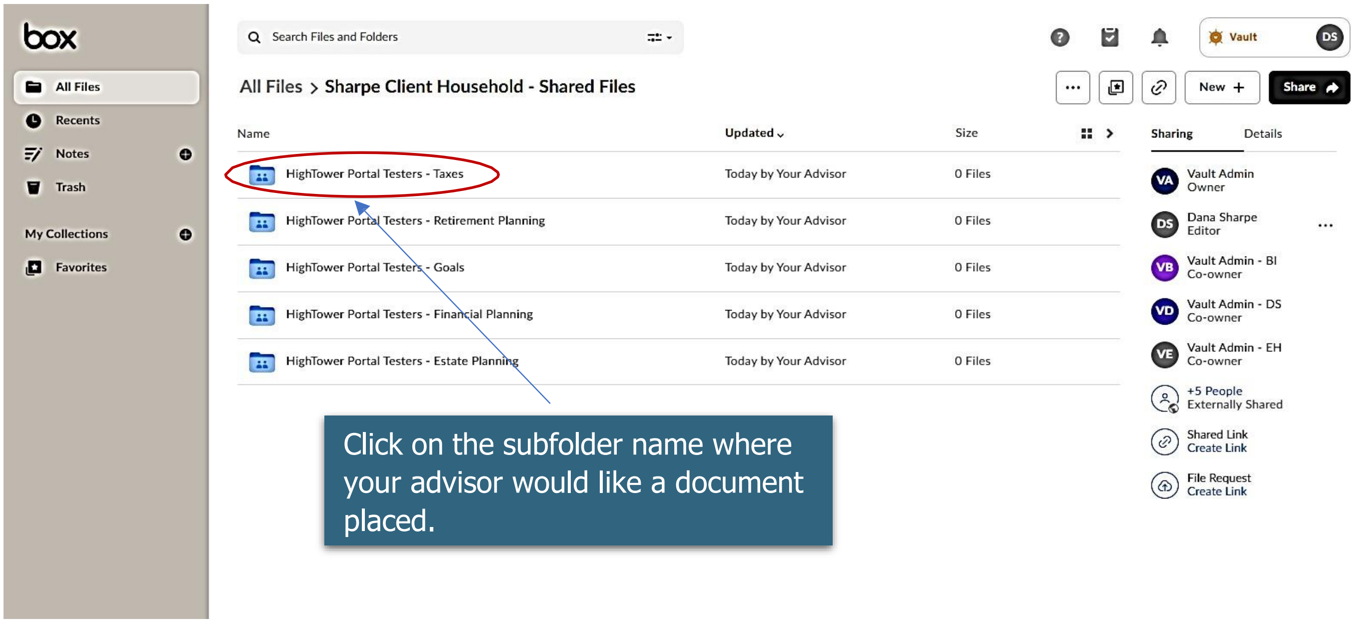
Box is the vendor we have chosen to use for secure document storage. Your home vault page should look something like this.



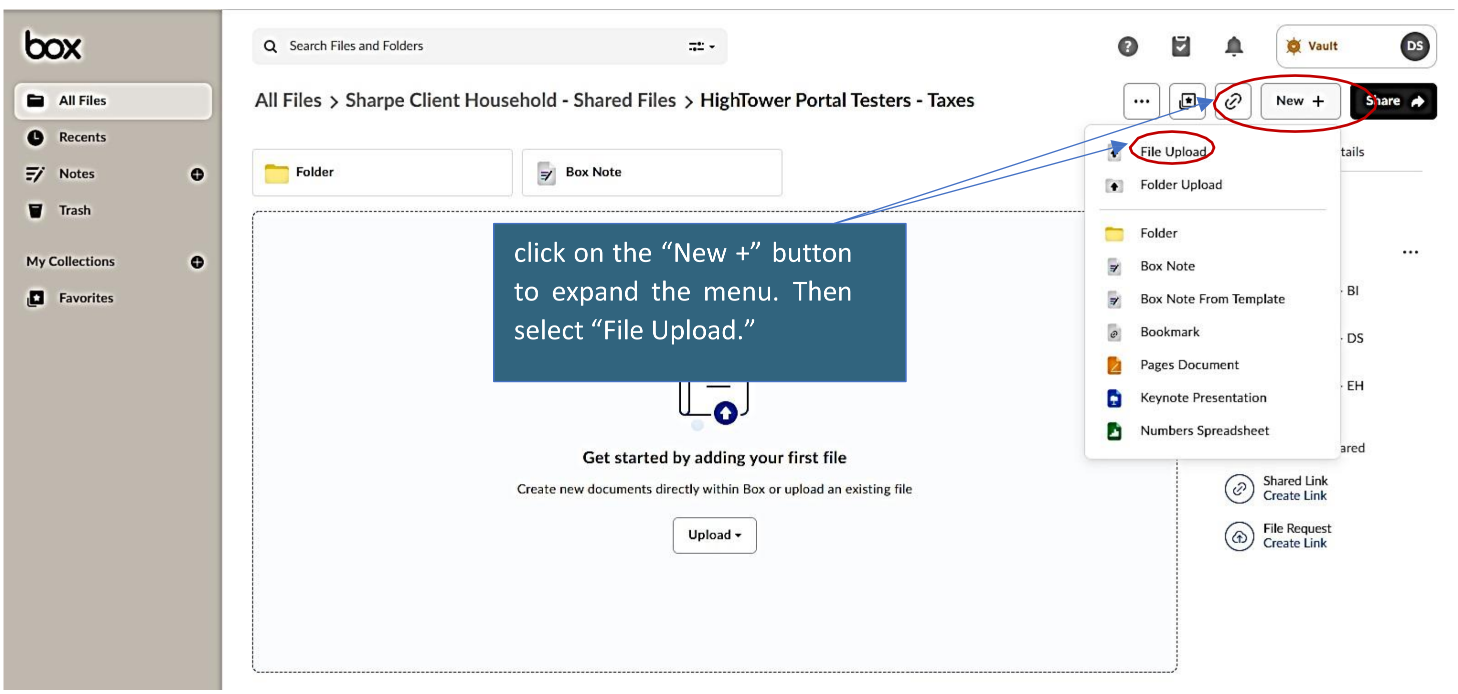

Click on the top blue folder to access documents shared by your Advisor.




Click on the "Shared Files" folder name to see a list of subfolders. You will upload documents to a subfolder name specified by your advisor. **NOTE: you cannot upload documents on this page. You must open the blue folder in order to upload a document for your advisor.**



box
All Files
Recents
Notes
Trash
My Collections
Favorites
Search Files and Folders
Vault
All Files > Sharpe Client Household - Shared Files
New +
Share
Name
Updated
Size
Sharing
Details
HighTower Portal Testers - Taxes
HighTower Portal Testers - Retirement Planning
HighTower Portal Testers - Goals
HighTower Portal Testers - Financial Planning
HighTower Portal Testers - Estate Planning
Today by Your Advisor
0 Files
Vault Admin
Owner
Dana Sharpe
Editor
Vault Admin - BI
Co-owner
Vault Admin - DS
Co-owner
Vault Admin - EH
Co-owner
+5 People
Externally Shared
Shared Link
Create Link
File Request
Create Link
Click on the subfolder name where your advisor would like a document placed.

box
All Files
Recents
Notes
Trash
My Collections
Favorites
Search Files and Folders
Vault
All Files > Sharpe Client Household - Shared Files > HighTower Portal Testers - Taxes
New +
Share
Folder
Box Note
File Upload
Folder Upload
Folder
Box Note
Box Note From Template
Bookmark
Pages Document
Keynote Presentation
Numbers Spreadsheet
click on the “New +” button to expand the menu. Then select “File Upload.”
Get started by adding your first file
Create new documents directly within Box or upload an existing file
Upload
Shared Link
Create Link
File Request
Create Link

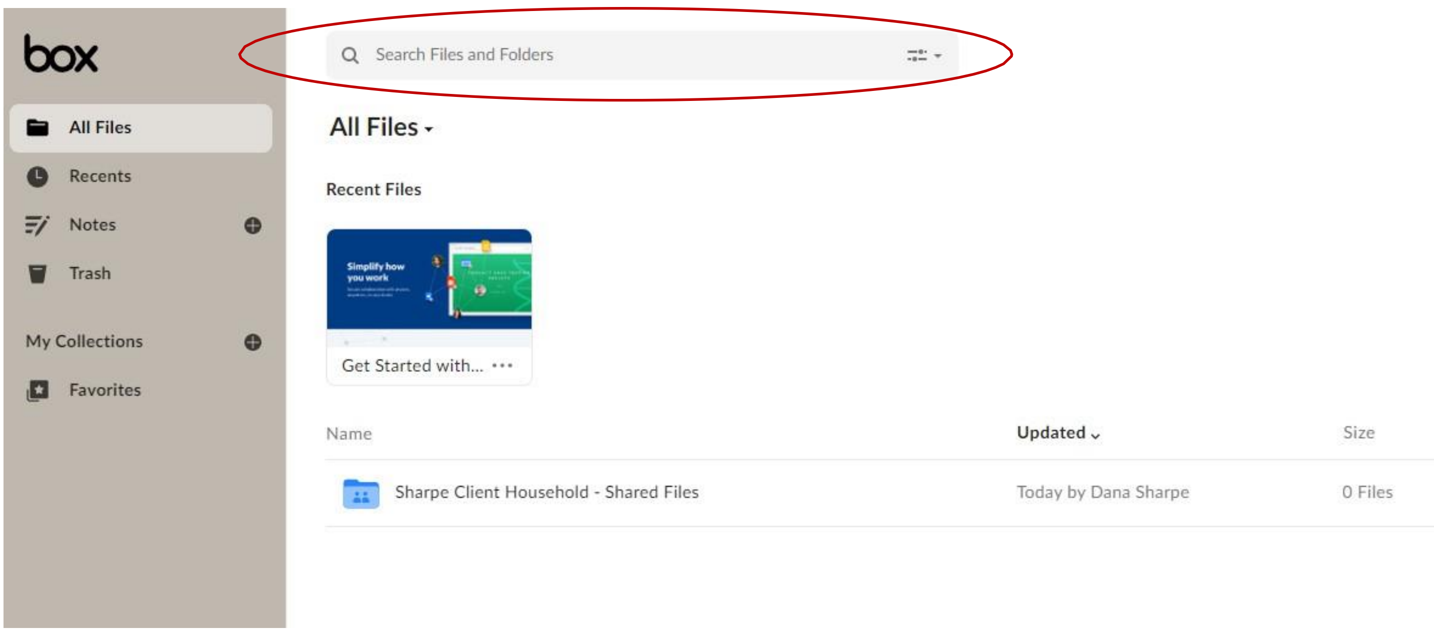
## Locate and open a document shared by your Advisor.

Once your files are in the Well-th Vault it's easy to access them wherever you are. You have three slick shortcuts at your disposal: the Search tool, Jump to Folder and the Updates view.

### Search

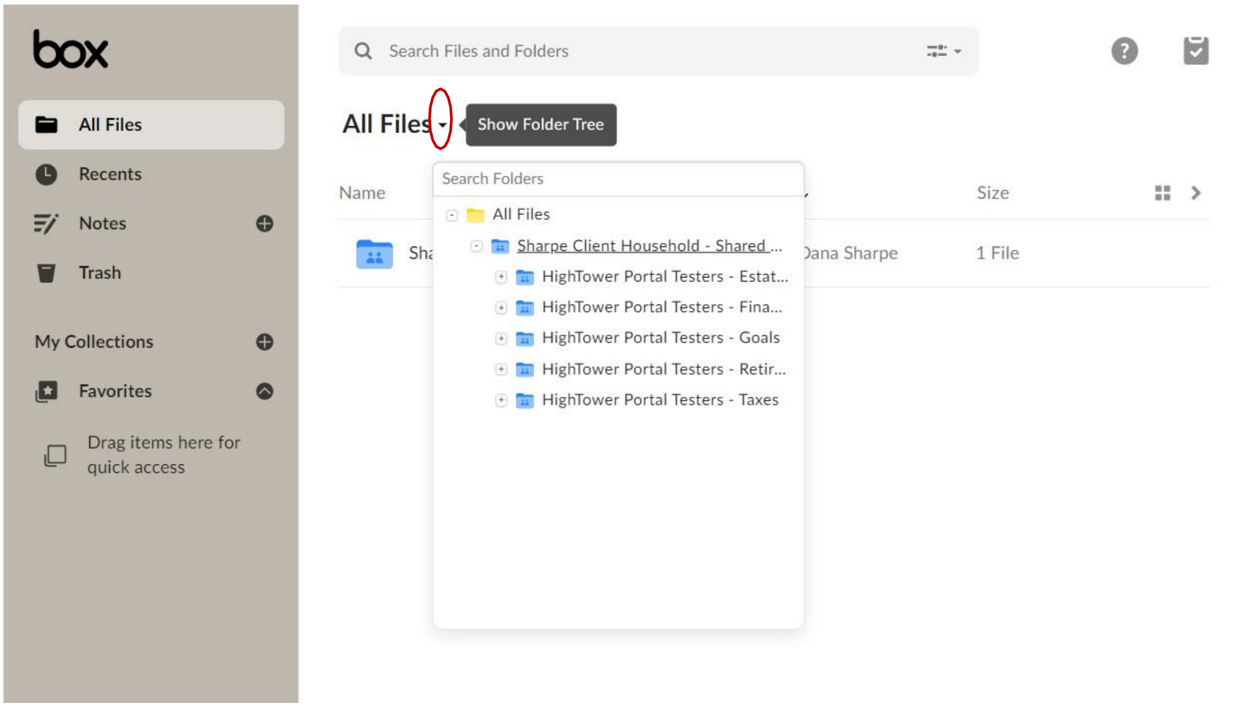
If you're looking for a certain file – or even a certain word or phrase within a file – jump right to it with the Search tool. Just enter your key word or phrase into the search bar at the top of your page.

The Well-th Vault will search the titles of your files and folders as well as the body of your documents.



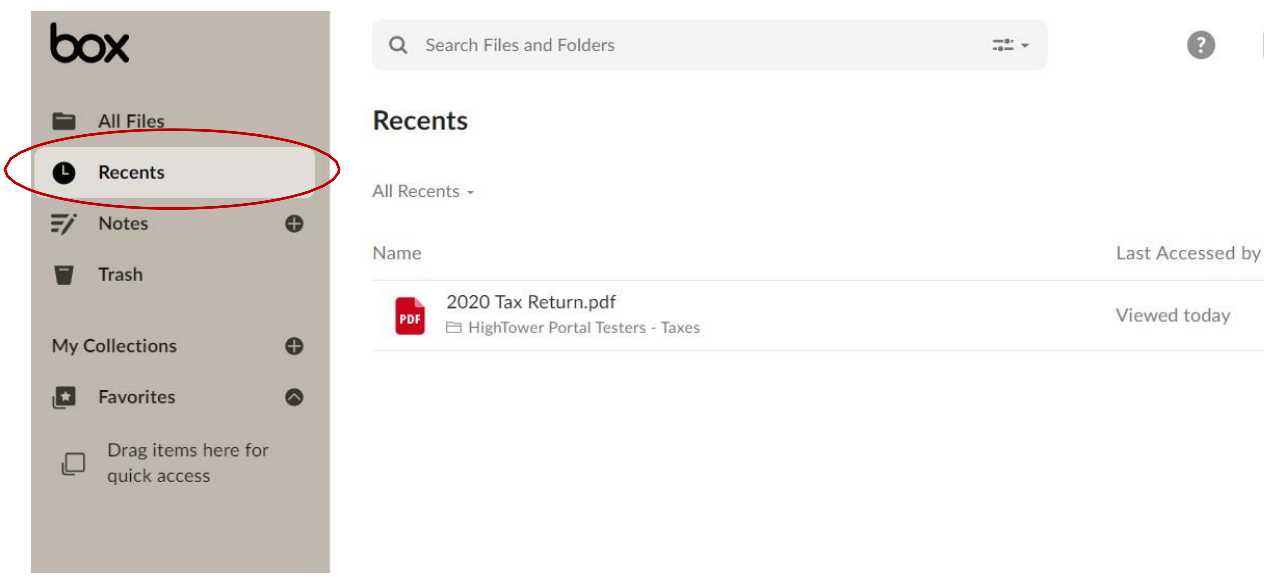
Folder Tree

If you want to get to a folder quickly, use the Folder Tree tool. Simply click the down arrow next to All Files and select "Show Folder Tree" to see your entire folder structure. Click on the desired subfolder to be taken directly there.



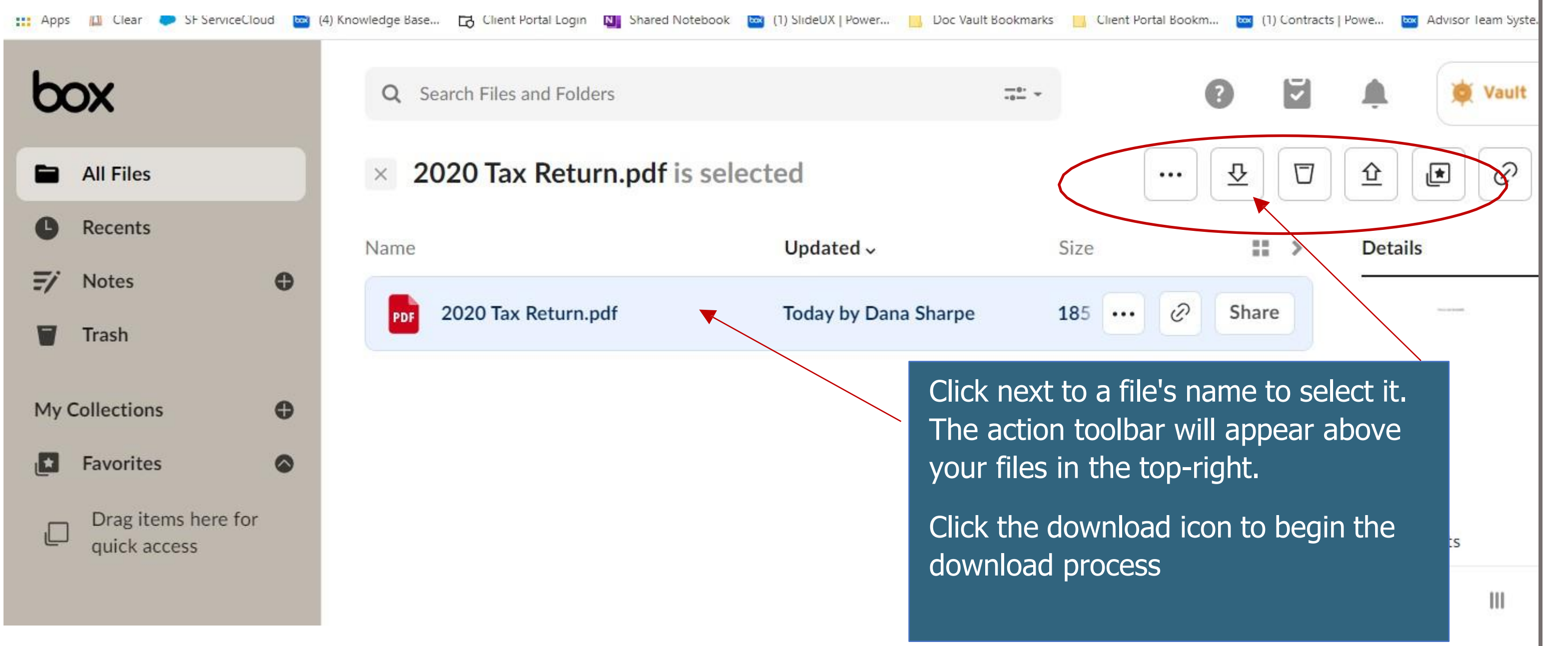

Recents

On this page, you'll see what files and folder have been recently updated in your vault account. To view recent updates, click "Recents" in the left side bar.



## Download a file shared by your Advisor.

To Download a Single File:




To Download Multiple Items:

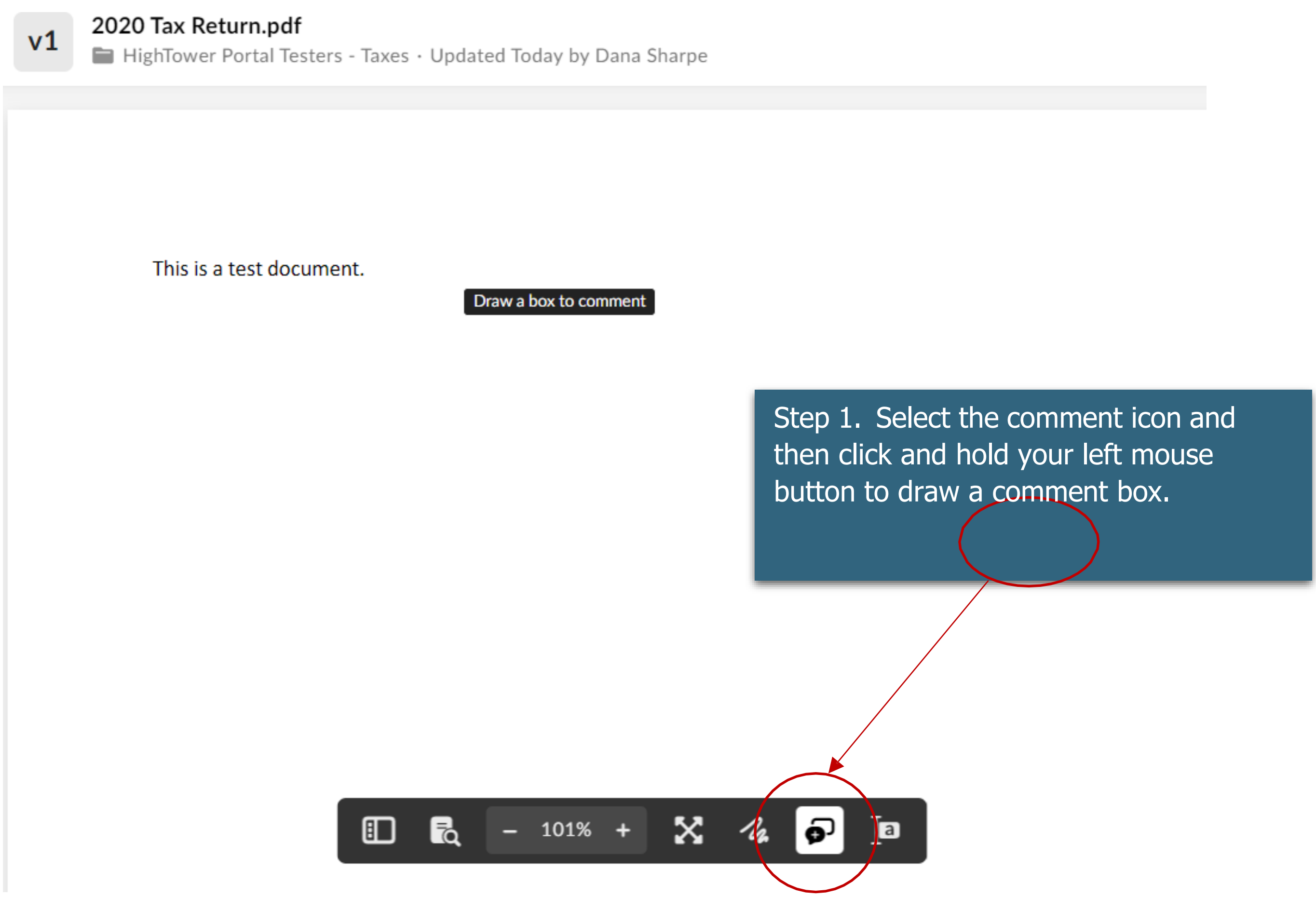
- Shift+click on multiple items to select them. The action toolbar will appear above your files in the top-right.
- Click **Download** to begin the download process. Your selected items will be downloaded together in a single zip file.

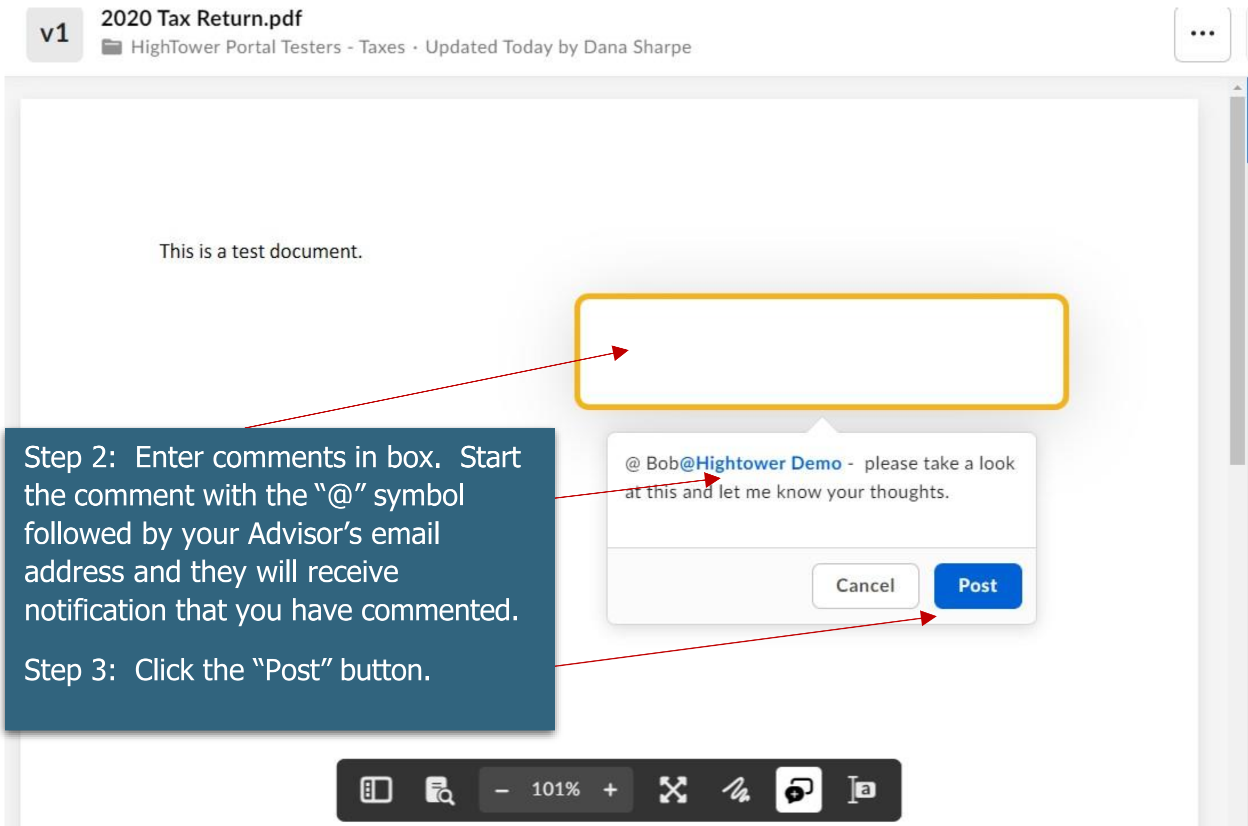
## Add comments or annotations to files.

Comments provide a powerful way to drive discussion around content in your Vault account. Use comments to request feedback from your Advisor, make notes to yourself, notify your Advisor of updates to a file, and a variety of other social interactions.

You can view comments in the Preview page of a file within the sidebar to the right or post your own in the "Write a comment" box at the bottom. Your Advisor can reply directly to a comment or add their own comments.

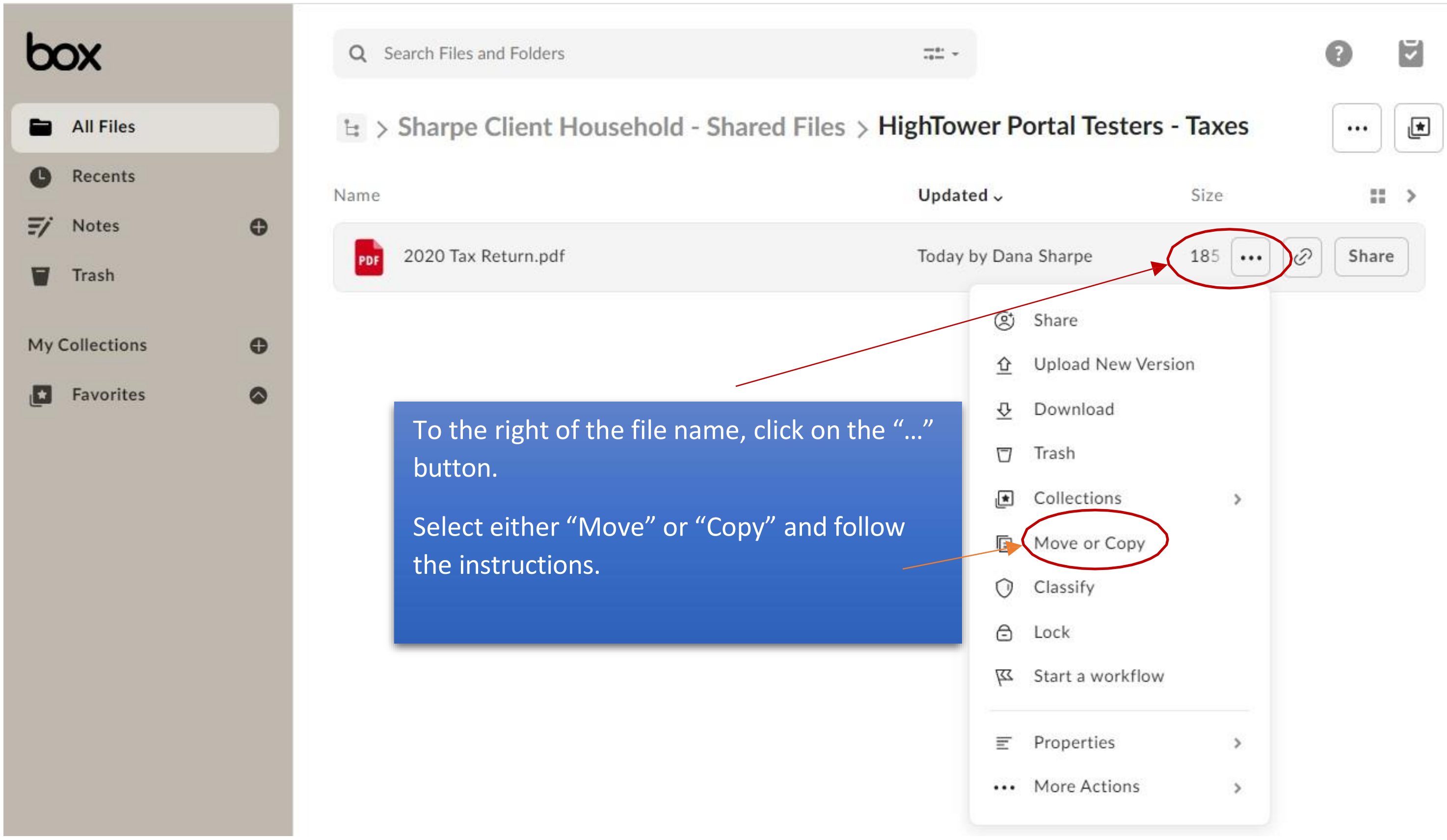
Communicating with your Advisor:






This message also remains with the file or folder on which you've commented. This gives context for others coming to work with this information.

Move or copy files from folder to folder.
Locate the file you wish to move or copy.




Add subfolders as desired.

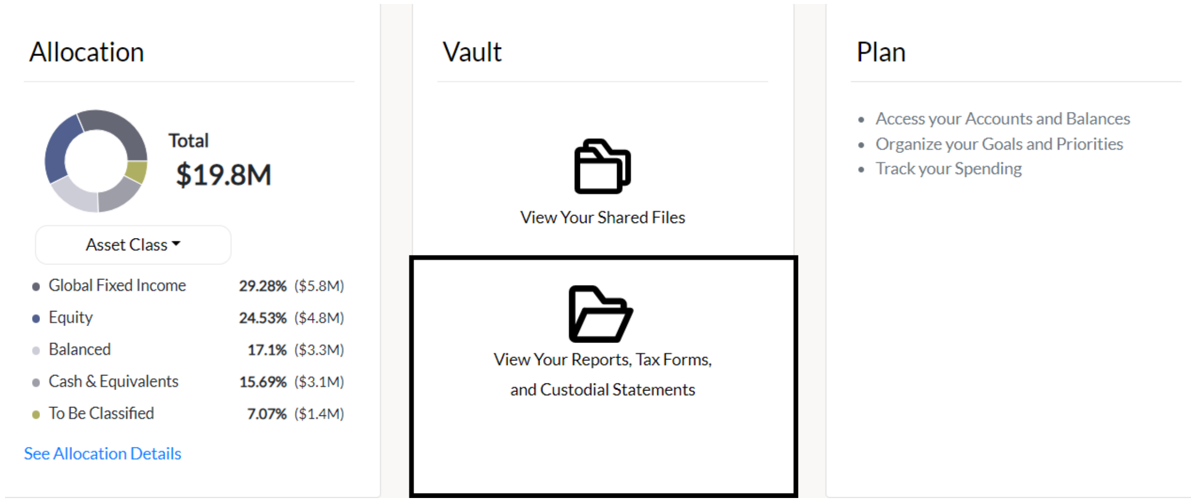
- Click New, and from the menu that displays click New Folder. The Create a New Folder dialog box displays.
- Enter the folder name.
- Advisors will automatically have access to any folders added.

Email Notifications

To keep you apprised of current events in your account, we've built an email notification system that lets you know when your Advisors accesses your content or edits your files. You will receive an email when your Advisor shares files with you too.

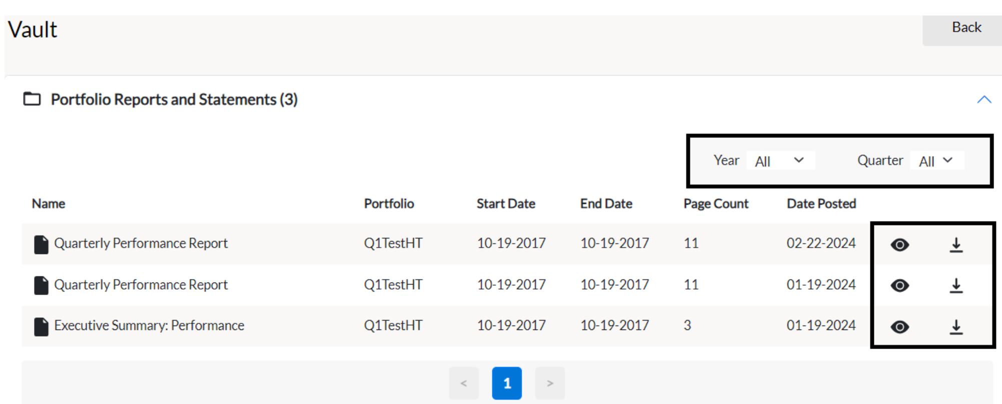
## View Your Reports, Tax Forms and Custodial Statements

Click on “View Your Report, Tax Forms and Custodial Statements” to access your quarterly reports, tax forms and custodial statements.




To access your Black Diamond reports and statements, simply click on the dropdown menu. From there, you can choose to view them directly on your screen or download them to your device.


To view your reports directly on your screen, click on the eye icon. Alternatively, click on the down arrow To save the report on your device. Find the desired report, and list may be filtered by selecting a year And/or quarter.



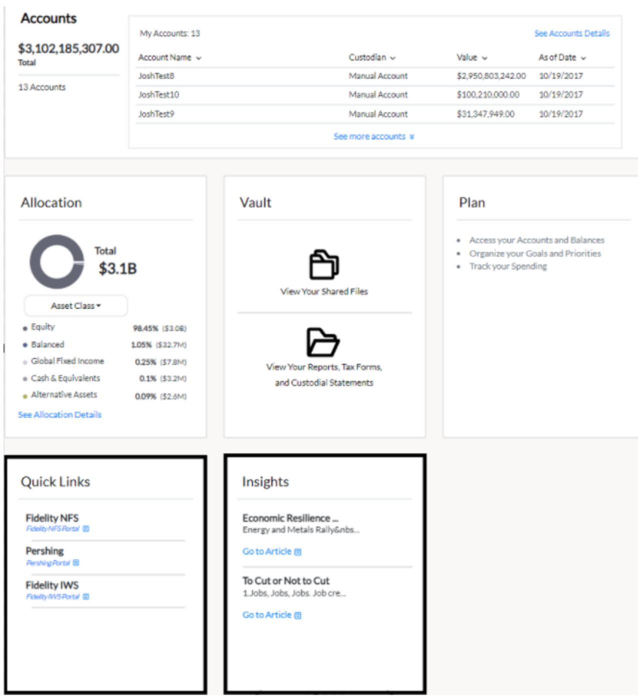
## Quick Links

The quick links tile entitles shortcuts or navigational aids that provide you access to custodial links such as Fidelity, Schwab, and Pershing.

- Select the available shortcut to access various services quickly.

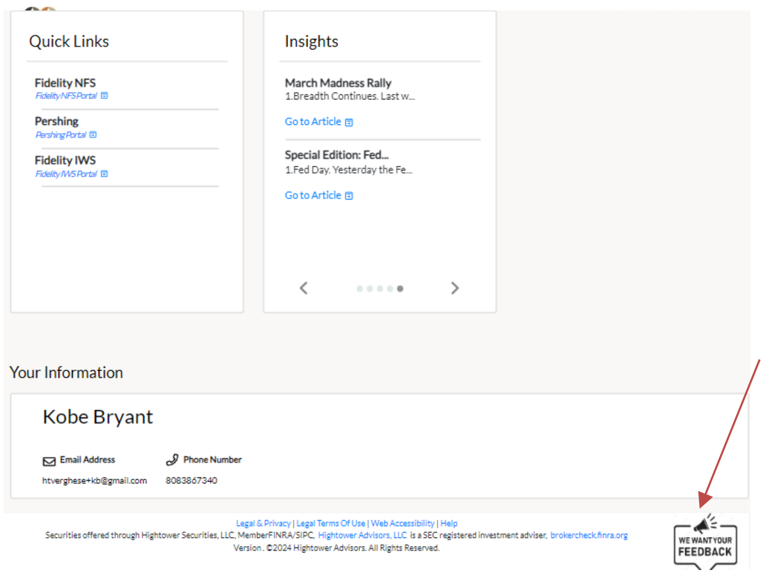
## Insights Tile

The Insights feature allows you to view articles shared or authored by us. Click" Go to Article" to read the desired piece.

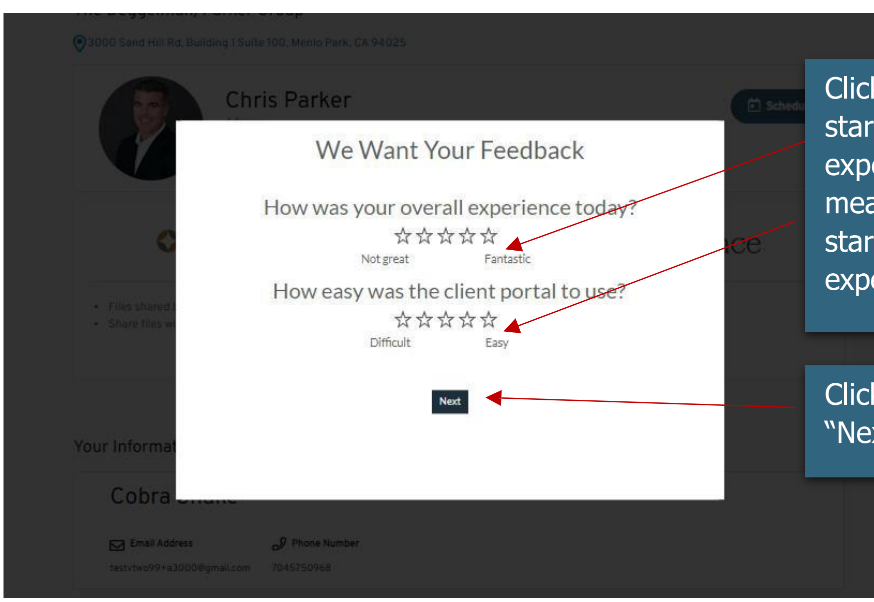


## Provide Feedback on the Well-th View or Well-th Vault Portals.

We value your opinion and would like to hear about your experience with Well-th View. A feature that allows you to rate your experience has been added.




Click on "We Want Your Feedback."

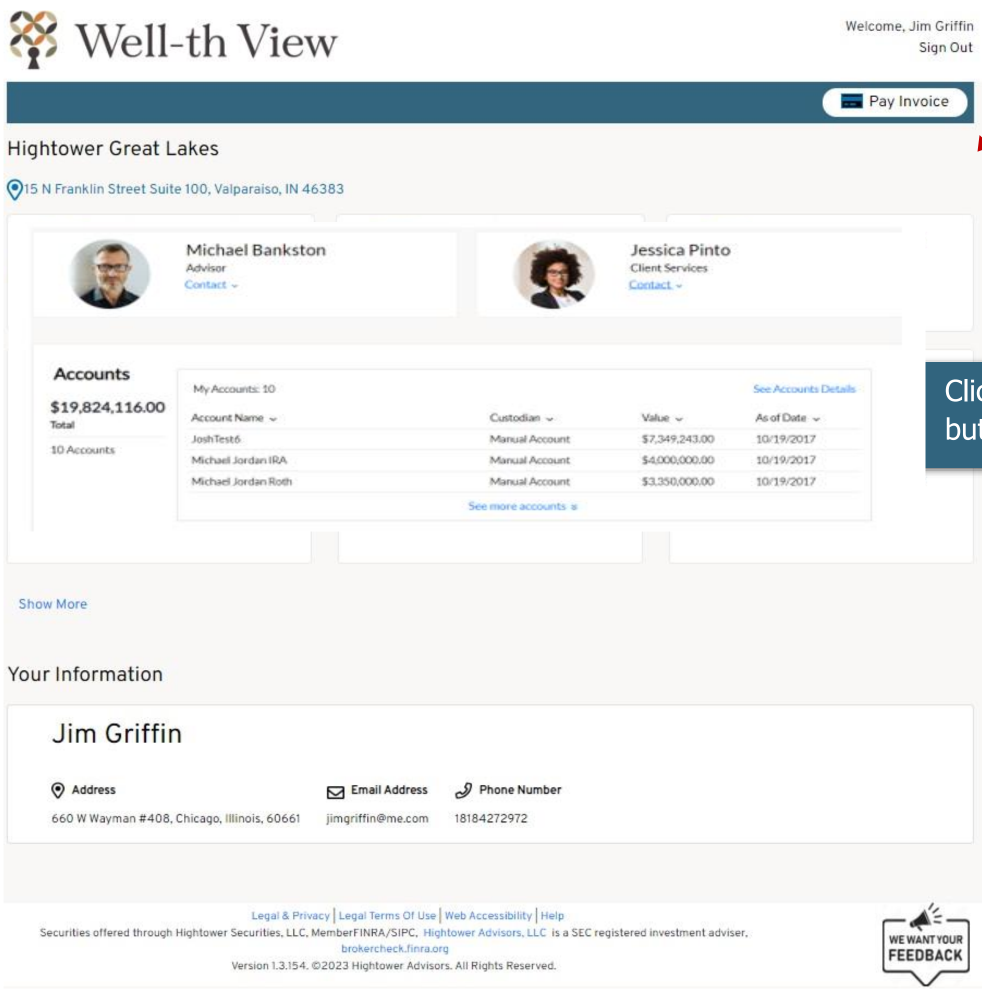



Click on the number of stars to rate your experience (one star means not so good, five stars means fantastic experience).

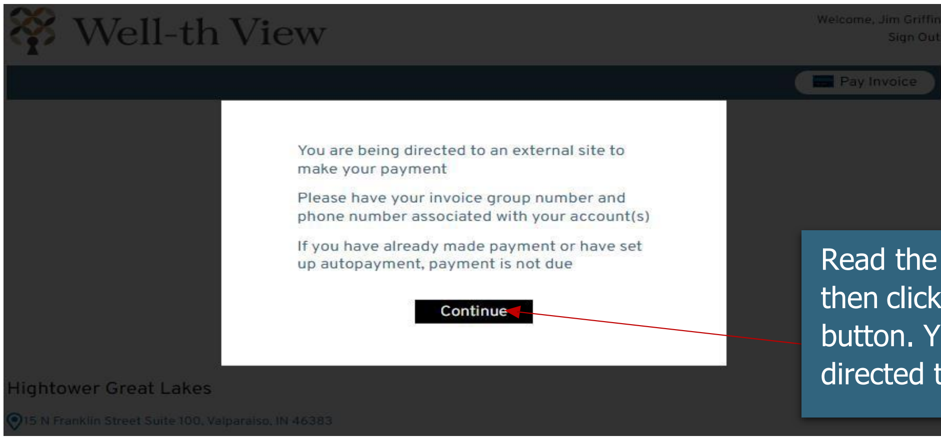
Click on the "Next" button.

## Invoice Payments

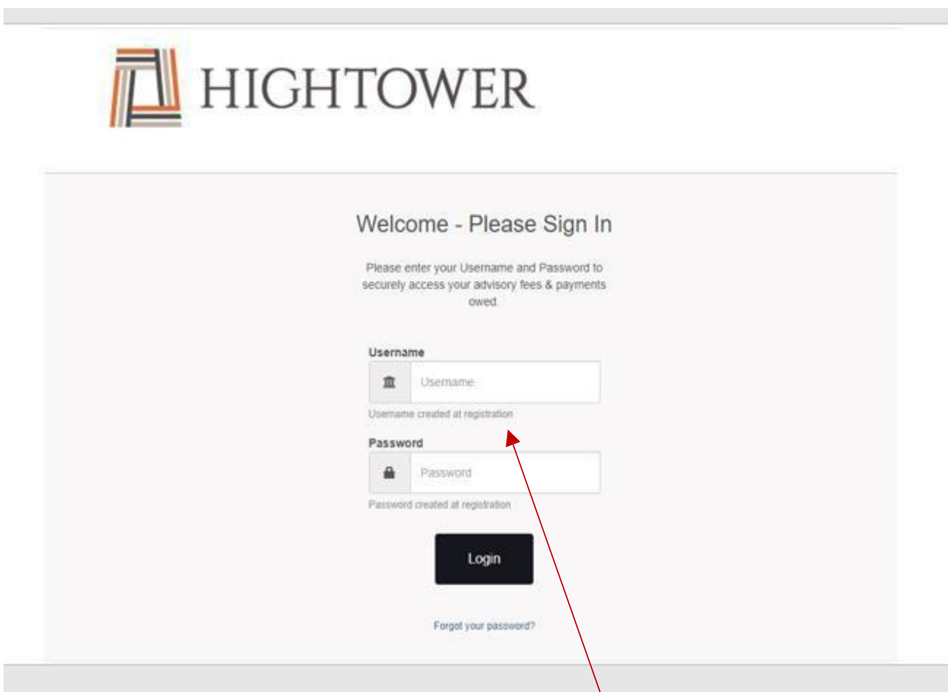
If you have chosen to receive an invoice for any advisory fees from your advisor, you will see a link on the Well-th View Home page that allows you to pay your invoice online. Note: Pay Invoice is not applicable.




Click the "Pay Invoice" button.




Read the disclosure and then click the "Continue" button. You will be directed to a new page




Enter your username and password to pay your advisory fees and any payments owed.