

PVWM Portal Overview

Access the NEW PVWM Portal:

- Direct URL: <https://main.yhlsoft.com/auth/users/webportal/pvwealthmgt>
- From PVWM Website Home Page – www.pvwealthmgt.com click on the **CLIENT LOGIN** button in the upper right-hand corner, then click the **NEW PVWM Portal** button
- Bookmark either method for future access

Home Tab: This is the landing page after logging in to your PVWM Portal. This is where you can link or add accounts to see an aggregated view of your Net Worth, access financial plans, see open reminders or tasks and find quick links to helpful websites.

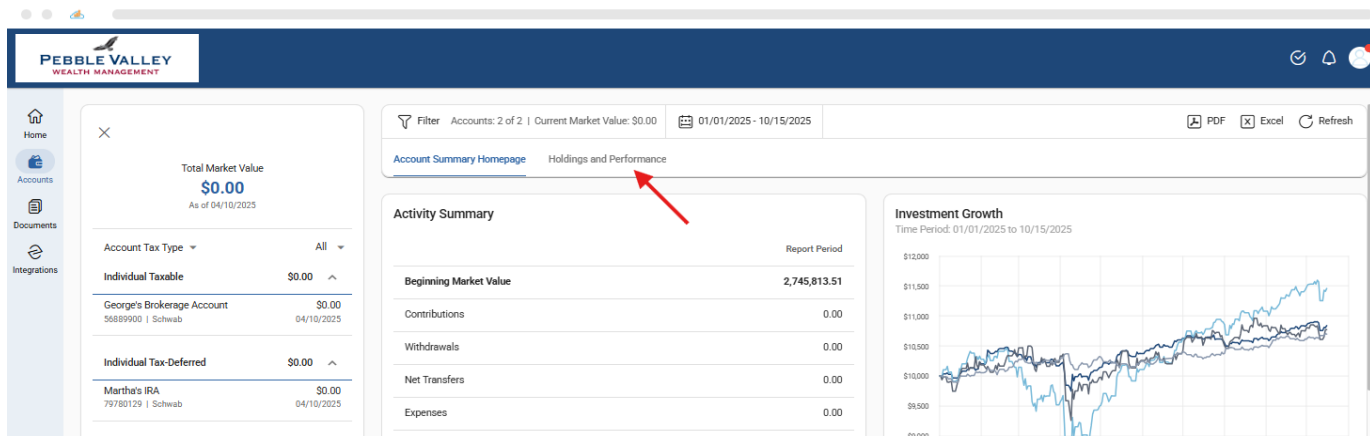
The screenshot displays the PVWM Portal Home Page. The top navigation bar includes the Pebble Valley Wealth Management logo and a 'CLIENT LOGIN' button. The main content area is divided into several sections:

- Net Worth List:** A table showing Net Worth (\$3,180,784.12), Assets (\$3,485,784.12), and Liabilities (-\$305,000.00). A 'Manually Add' button is located at the top right of this section.
- Financial Plan:** A section with a 'MoneyGuidePro' link and a warning icon indicating 'There is no data available'.
- To Do List:** A section with 'Open' and 'Completed' tabs, showing a 'You're all caught up!' message.
- Firm Links:** A section with links to the Pebble Valley Home Page and a chat with Kirk.

Home Page Widgets Overview

- **Net Worth List**- a detailed breakdown of a client's net worth. Clients can link or manually add assets or liabilities by clicking the Manually Add button at the top right corner.
- **Financial Plan**- this is where clients can access their initial risk tolerance assessment, data gathering and eventually financial plan by clicking on the MoneyGuidePro Link. A new tab will open, and financial plans can be found by scrolling down to Report History at the bottom of the page. Note that this report will not be available for Investment Only clients.
- **To Do List**- this is where the advisor can list open tasks or reminders for clients
- **Firm Links**- hyperlinks to useful websites including our homepage, a recommended budgeting app, custodian sites and a link to our calendar for meeting scheduling.

Accounts Tab: This page shows YTD portfolio activity, investment growth and current portfolio positioning for **only the accounts managed by PVWM**. You can also see a breakdown of current holdings and YTD performance by clicking on the Holdings and Performance Tab.



Documents Tab: This is where clients can access PVWM monthly investment reports, Custodian documents including monthly statements and tax forms as well as securely upload documents to share with your Advisor. This can be done by clicking on the Shared Files tab and clicking the Actions > Upload Files button on the right hand side.

The screenshot displays the Pebble Valley Wealth Management dashboard with the 'Documents' tab selected. The top navigation bar shows 'Recent', 'Shared Files', and 'Custodian Documents'. The 'Shared Files' tab is active, and a red arrow points to the 'Actions' button in the top right corner. Below the navigation bar, a table lists documents. The table has columns for Name, Date Added, and File Size. A red arrow points to the 'Actions' button in the top right corner of the table.

Name	Date Added	File Size
Investment Reports	03/04/2024 03:45 PM	9 items

Profile Tab: This is where client contact information is updated, but most importantly where clients can view, link and fix any issues with linked accounts.

The screenshot displays the Pebble Valley Wealth Management dashboard with the 'Profile' tab selected. The top navigation bar shows 'Client Details', 'Risk Tolerance', and 'Synced Accounts'. The 'Synced Accounts' tab is active, and a red arrow points to the 'Actions' button in the top right corner. Below the navigation bar, a table lists accounts. The table has columns for Account Name, Account Number, Institution, Source Acct Number, Account Balance, Account Owner, Status, Last Updated, Detailed Error, and Source Account Type. A red arrow points to the 'Actions' button in the top right corner of the table.

Account Name	Account Number	Institution	Source Acct Number	Account Balance	Account Owner	Status	Last Updated	Detailed Error	Source Account Type
CHASE SAVINGS XXXX7908	14699466	Chase	*****8657	\$1,006.53		Active	10/16/2025 10:02 AM		Savings Account
CREDIT CARD XXXX2274	14699460	Chase	*****8055	\$-5,934.41		Active	10/16/2025 10:02 AM		Other
TOTAL CHECKING XXXX937	14699461	Chase	*****3683	\$9,411.59		Active	10/16/2025 10:02 AM		Other