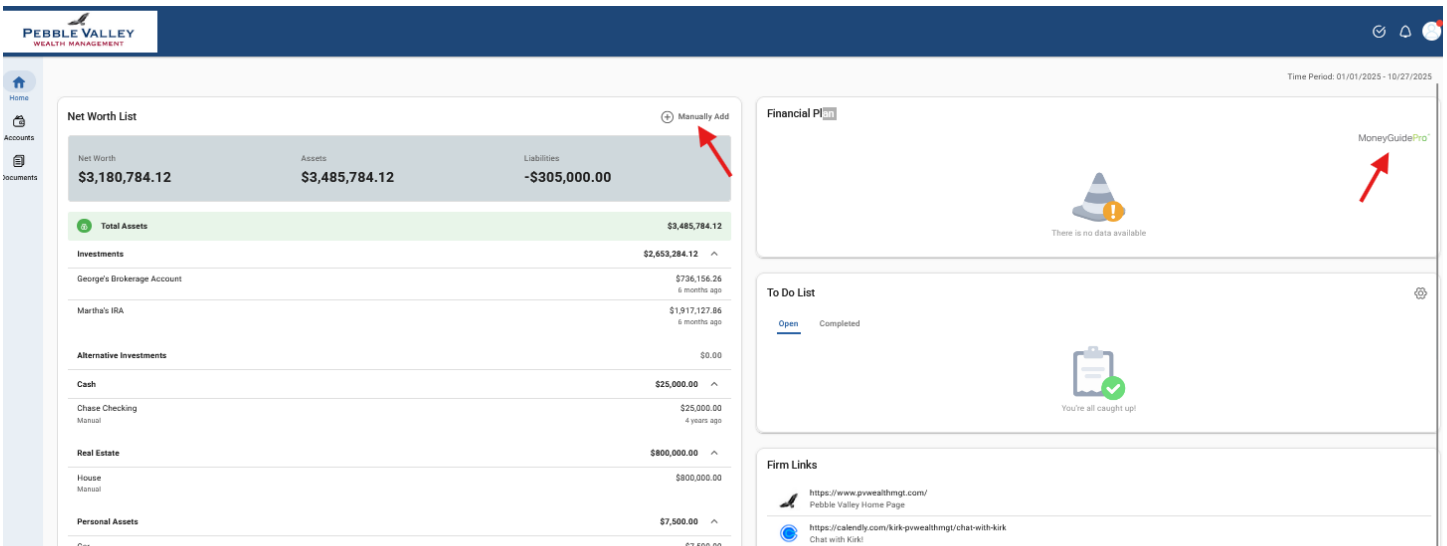
PVWM Portal Overview

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**

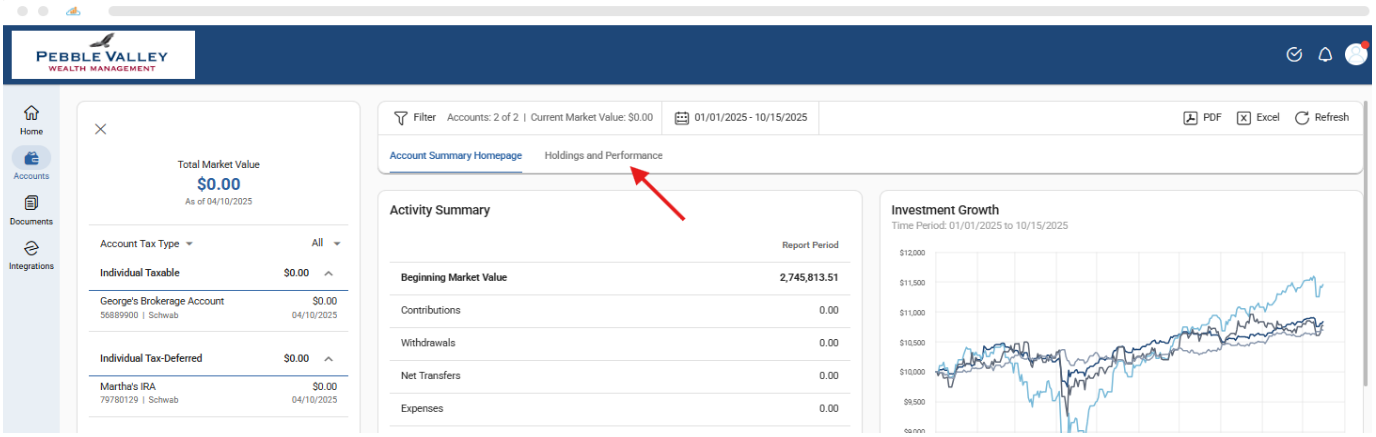
Home Tab: This is the landing page after logging in to your PVWM Portal. This is where you can link or add accounts to see an aggregated view of your Net Worth, access financial plans, see open reminders or tasks and find quick links to helpful websites.



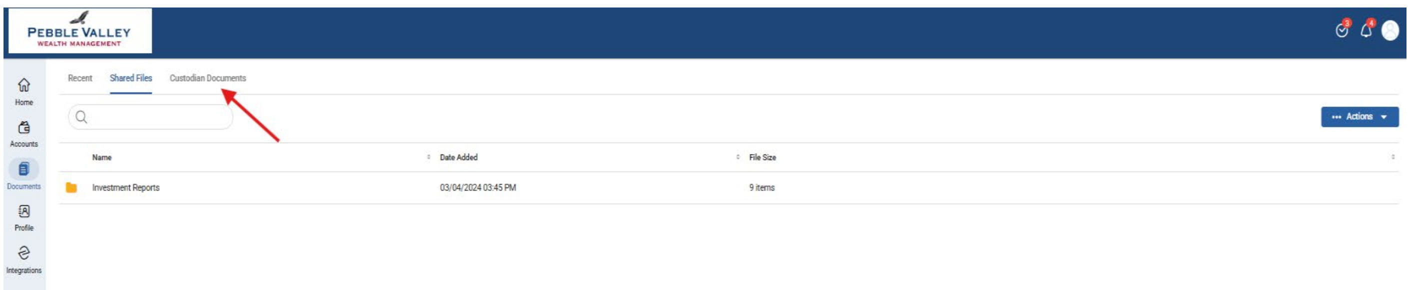
<u>Home Page Widgets Overview</u>

- <u>Net Worth List</u>- 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.
- <u>Financial Plan</u>- 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.
- <u>To Do List</u>- this is where the advisor can list open tasks or reminders for clients
- <u>Firm Links</u>- 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 **<u>only the accounts managed by PVWM</u>**. 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.



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.