



## Client Website and Document Vault

Cygnnet is very pleased to offer you secure online access to your Cygnnet Managed Account and important documents. Our site gives you the ability to view a lot of information about your account including its current value, account activity and performance for various time periods, and much more.

In addition, you have an easy drop-down menu that allows you to view all this information on an individual account-by-account basis or with all your accounts combined so you can see an overall picture.

Another feature of this online client portal is the document vault. This is a highly secure system where online copies of your *Quarterly Performance Reports* and other documents we've posted will be stored. This allows you to download current and past reports whenever you want, without the clutter of paper.

Of course, we'll mail you a paper copy of your *Quarterly Performance Report* if that's your preference.

The other nice feature of the document vault is that it allows YOU to upload documents to Cygnnet in a convenient and secure manner. That way you don't have the security issues related to sending sensitive documents by email or the "hassle" of finding stamps or a fax machine.

If you are not already using your document vault, getting started is easy.

### Setting Up Access to Your Client Site

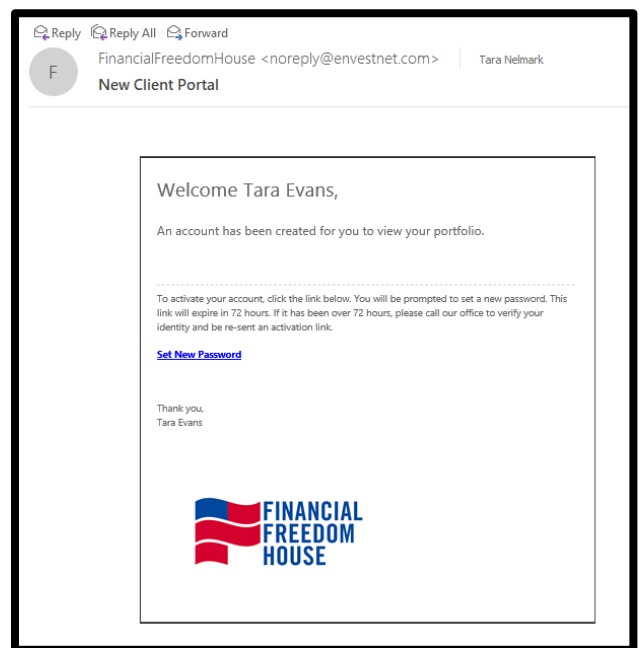
Call us at (248) 673-2900.

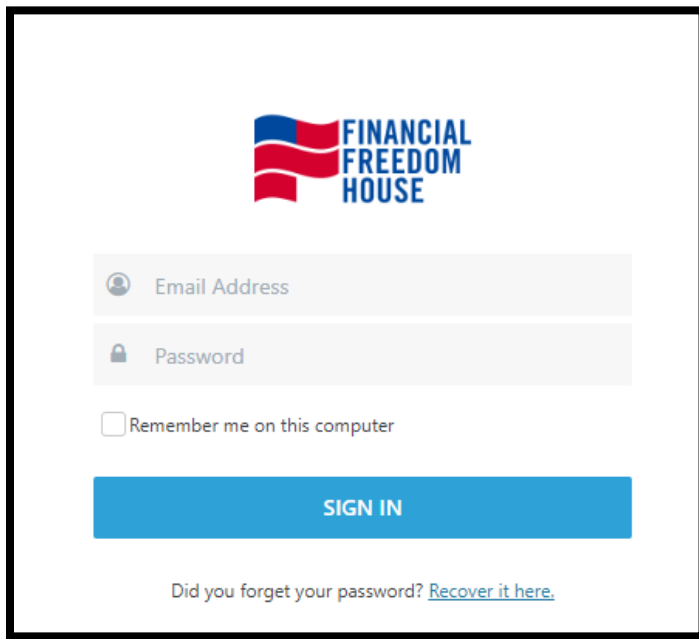
After confirming some information, you'll be sent an email with an activation link. The email come from Tamarac | Envestnet. It will look like this.

This link is unique to you and will allow you to set up your own password.

Note that this email is only good for 72 hours. If you don't get around to setting up your password in time, no problem, just give us a call and we'll send you a fresh link.

**Not a Client?**  
Log into our Demo Site at  
<https://ffh.portal.tamaracinc.com>  
using the following information  
Email: [Service@FinancialFreedomHouse.com](mailto:Service@FinancialFreedomHouse.com)  
Password: Demo1234





## Logging into Your Client Site

Using your internet browser, go to

<https://ffh.portal.tamaracinc.com/Login>

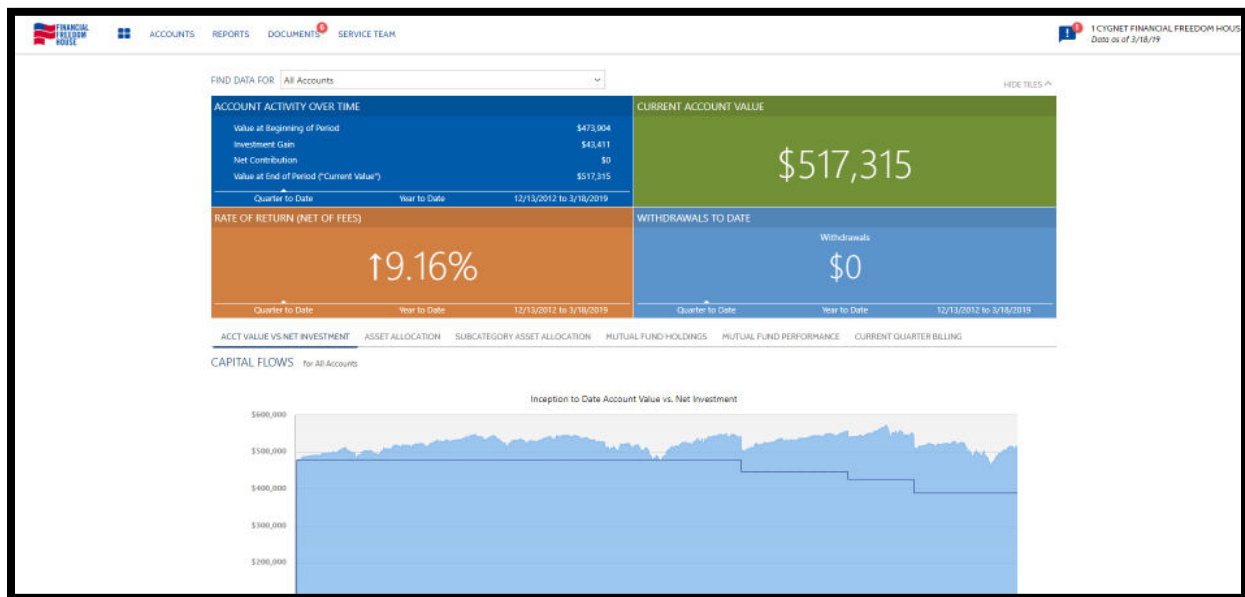
Save this address. This is where you will go in the future.

When logging in, be sure to use the email address we have on file (it's the one we sent the email with your activation link to) and the password you created.

If you try to use a different email, you won't be recognized. Give us a call if you want to use a different email and we'll send you a new activation link.

## Performance and Activity Reports

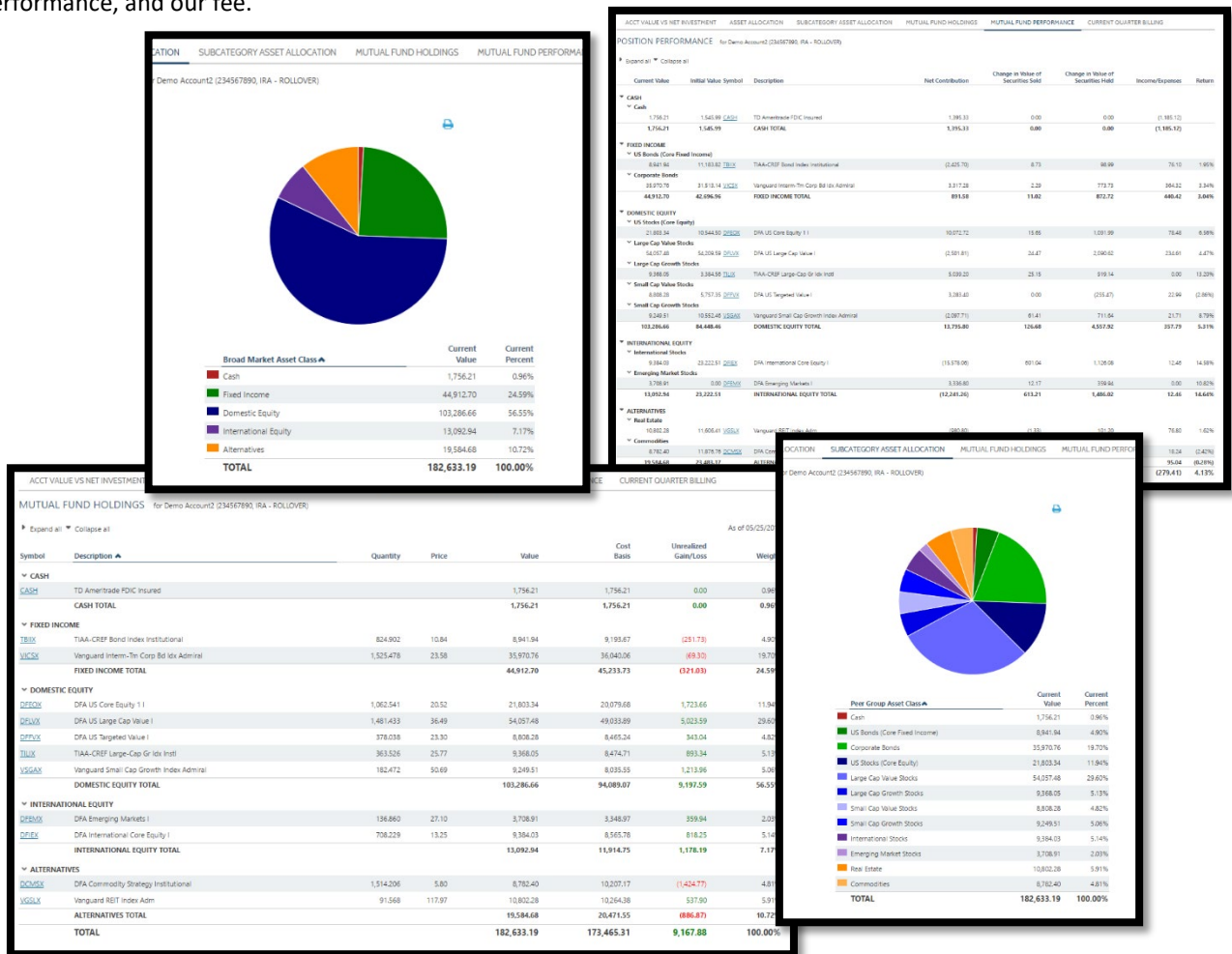
Once you log in, explore your client portal.



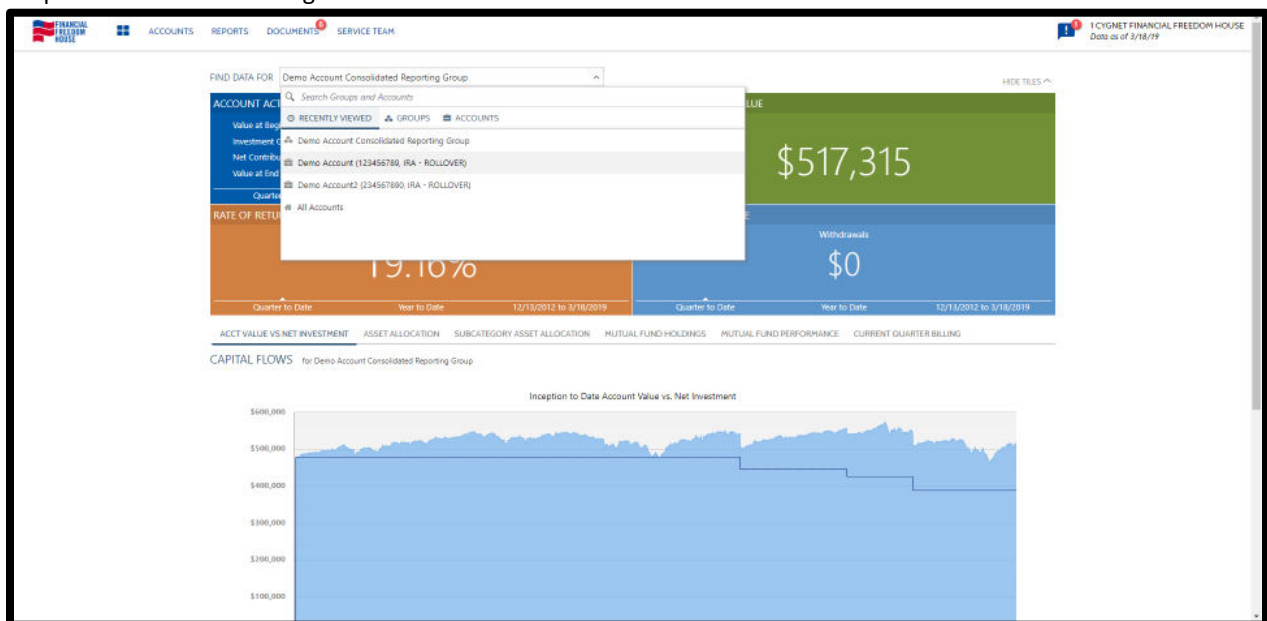
The 4 color tiles at the top contain the basic information most people want to see about their account. Click on the "Quarter to Date" or "Year to Date" labels and the numbers in the tiles will change accordingly. If you want to see numbers going back to when your Cygnet Managed Account was opened, click on the label with the two dates in it (the performance inception date for your account through yesterday)

Below those tiles, you see a menu bar where you can choose various reports to look at. Click on these menu bar items and the report on the bottom half of the screen will change.

Among other things, you'll be able to see the performance of your account compared to the amount you invested (minus any withdrawals), your current asset allocation, your current mutual fund holdings and fund-level performance, and our fee.

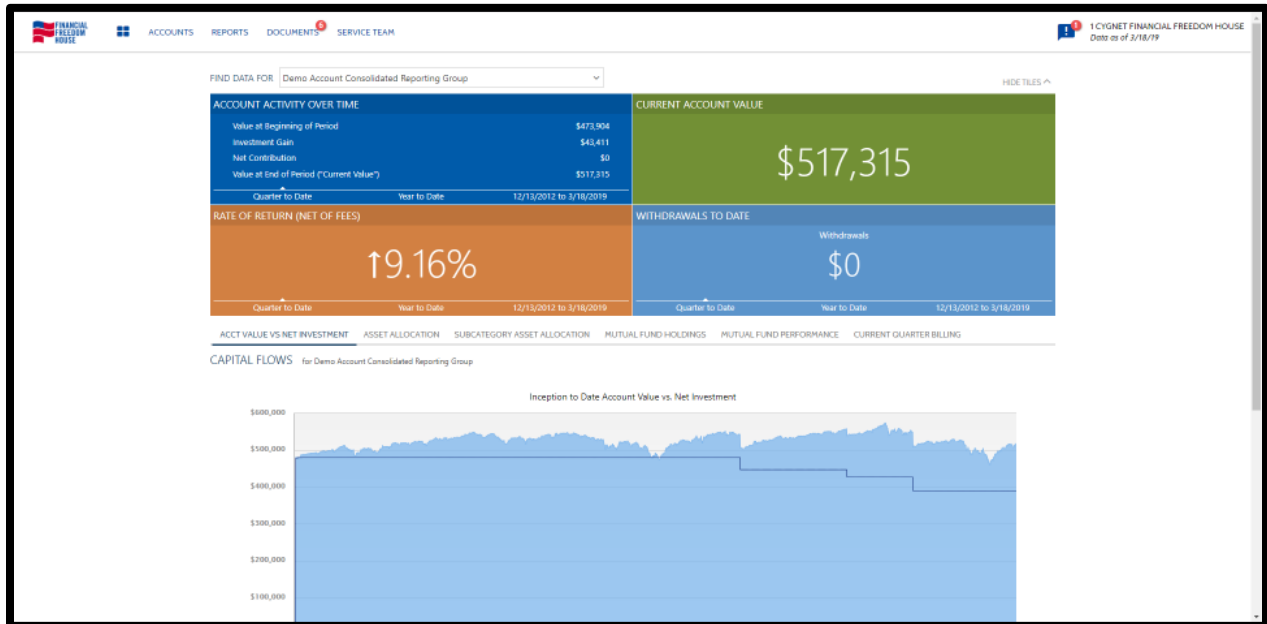


To change from an individual account to an "all accounts" consolidated view, choose the view you want from the drop-down menu located right above the blue box.



## Viewing Documents in the Document Vault

To access your document vault, simply click on the word “Documents” in the top menu bar. This will take you to a screen that lists all the documents we’ve posted for you and any documents you’ve posted for us.



You can sort this list of documents by using the dropdown boxes at the top of the screen and then pressing the blue “FILTER” button. You can also sort by “file name”, “description”, and “post date” by clicking on these labels at the top of the document list.

To download a copy of the document you want to view, just click the file name underlined in blue. When you download a document the original will stay in the vault so you can download it again in the future. That way you don’t have to create your own filing system in your house or on your computer.

## Sending Documents to FFH Using the Document Vault

Uploading documents into the vault is simple. First click on the blue button labeled “ACTIONS”. From there, click on “Post Document”

The screenshot shows the document vault interface with a list of documents. The "ACTIONS" menu is open, showing "Post Document" and "Download" options. The document list is as follows:

		Posted By	Post Date/Time ↓	Folder	Labels	Size
<input type="checkbox"/>	<a href="#">Quarterly Market Commentary</a>	Tara Evans	01/09/2019 09:38 AM	Market Commentaries	Quarterly Market Commentary	1.7 MB
<input type="checkbox"/>	<a href="#">Demo Account Consolidated Reporting Group 2018-12-31.pdf</a>	Tara Evans	01/08/2019 05:50 PM	Quarterly Account Reports	Quarterly Report	5.8 MB
<input type="checkbox"/>	<a href="#">Demo Account Consolidated Reporting Group 2018-09-30.pdf</a>	Tara Evans	10/05/2018 02:40 PM	Quarterly Account Reports	Quarterly Report	3 MB
<input type="checkbox"/>	<a href="#">Demo Account Consolidated Reporting Group 2018-06-30.pdf</a>	Tara Evans	07/05/2018 01:09 PM	Quarterly Account Reports	Quarterly Report	7.7 MB
<input type="checkbox"/>	<a href="#">Changes to Cygnet Managed Accounts (July 2018).pdf</a>	Tara Evans	07/05/2018 11:02 AM	Documents		713.7 KB

Then click the button labeled “Choose File” to find the document on your computer that you want to send us. Once that’s done, press the “Post” button and the file will be securely transmitted. You don’t even have to call us to tell us you’re sending something. The system will notify us that you posted a file.

## Helpful Hint

If you’re ever lost in the system and want to get back to the main screen, just click on the FFH flag logo.