Client Website and Document Vault

We are very pleased to offer you secure online access to your FFH 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 to navigate 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.

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

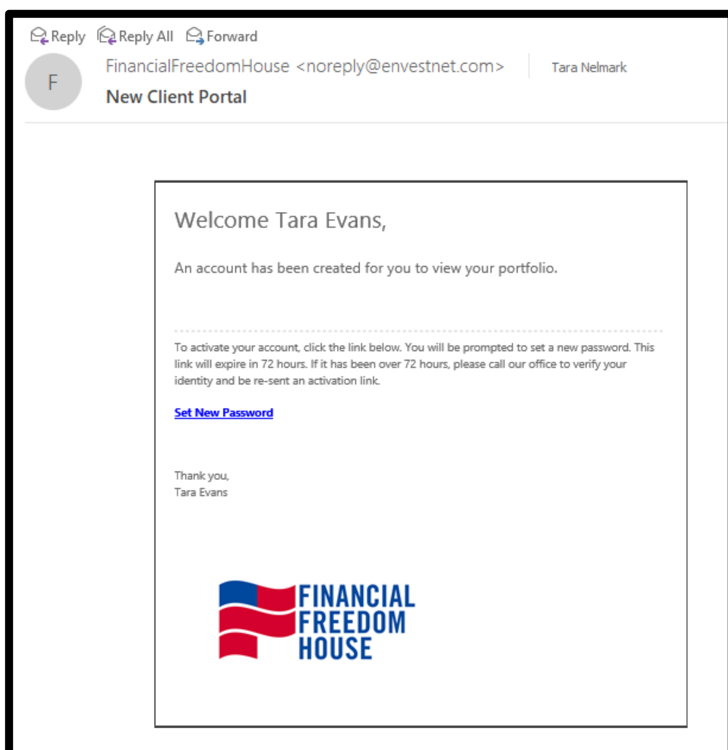
Setting Up Access to Your Client Portal

Call us at 248-673-2900.

After confirming some information, you'll be sent an email with an activation link. The email will 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: 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.



Reply Reply All Forward

FinancialFreedomHouse <noreply@envestnet.com> Tara Nelmark

New Client Portal

Welcome Tara Evans,

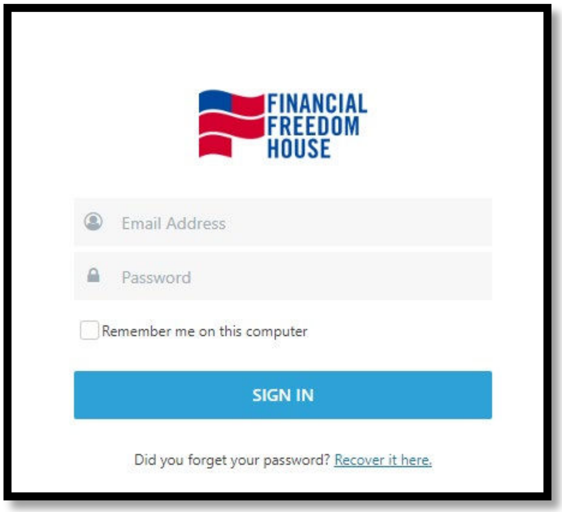
An account has been created for you to view your portfolio.

To activate your account, click the link below. You will be prompted to set a new password. This link will expire in 72 hours. If it has been over 72 hours, please call our office to verify your identity and be re-sent an activation link.

Set New Password

Thank you,
Tara Evans

FINANCIAL FREEDOM HOUSE



Logging into Your Client Portal

Using your internet browser, go to

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

Save this address. This is where you will go in the future. You can also scan the QR code provided.

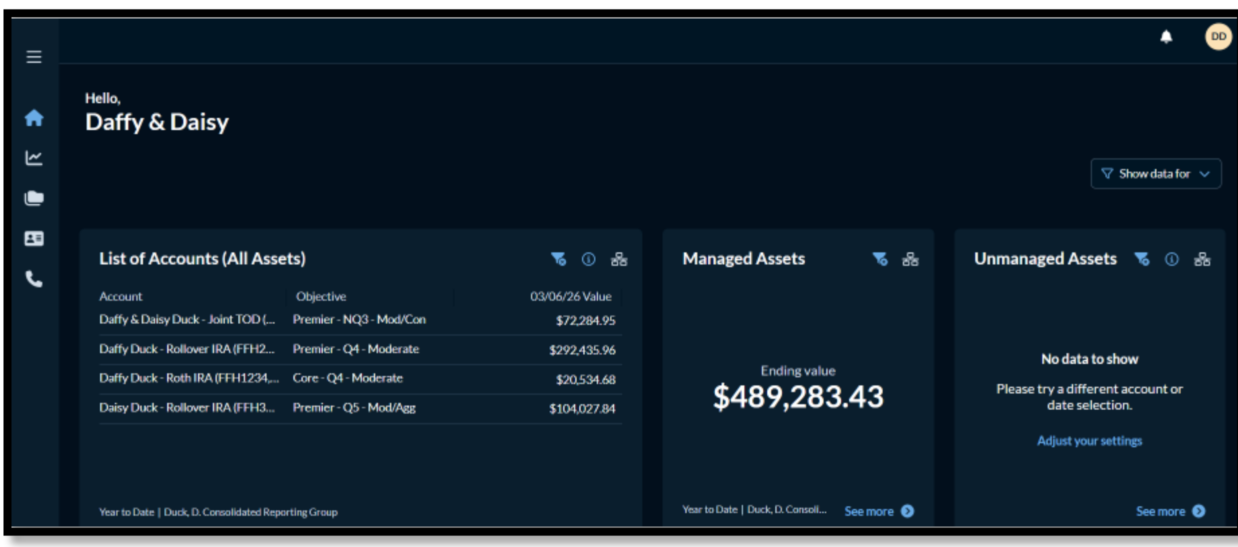
When logging in, be sure to use the email address we have on file *(it's the one we sent the email with your activation link to)* and the password you created.

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 update your email.

After clicking "**Sign In**", you'll be directed to multi-factor authentication (MFA) using your email address. You must click "**Request Code**", this will email an authentication code to the email on file. Enter the code from your email into your browser and click "**Verify**". This will complete your login process and is required each time you log in.

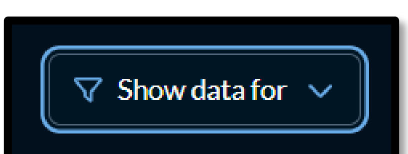
Navigating Your Client Portal

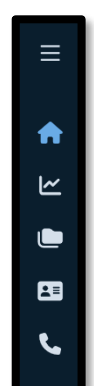
Once you log in, explore your client portal.



The 3 boxes on the home screen contain the basic information most people want to see about their account. For a more in-depth look into your accounts, use the navigation menu two ways on the left side of the screen either by clicking on the 3 lines in the top left corner of the screen, or by hovering over the icons directly below those lines.

To switch your view from all accounts to a specific account from your home page, use the "Show data for" drop-down menu located on the right side of the page, just above the 'Unmanaged Assets' section.





Navigation

Home

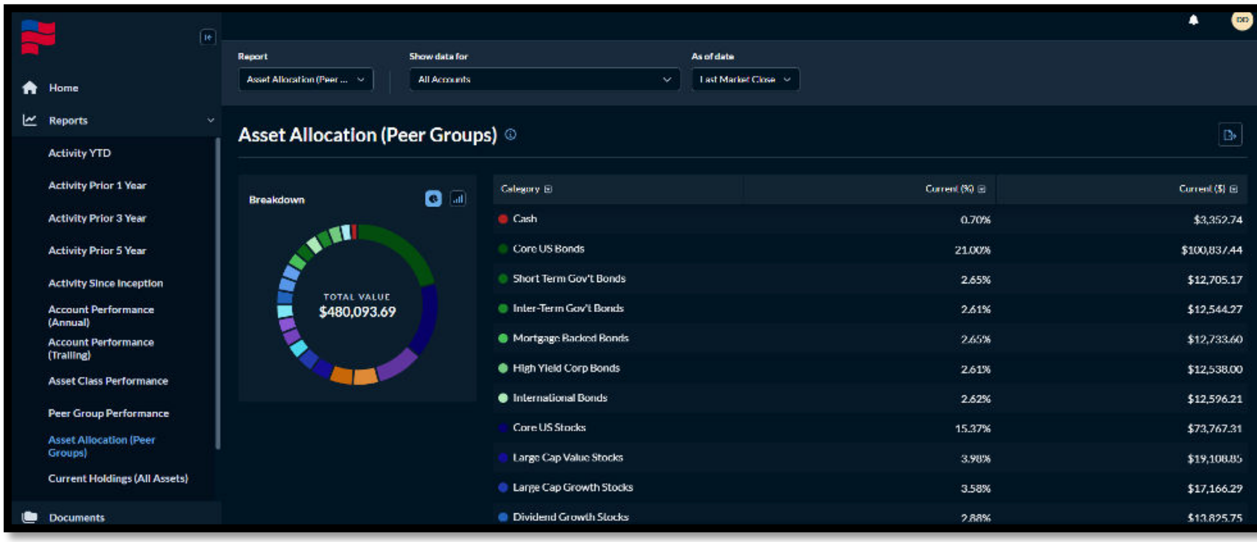
Reports

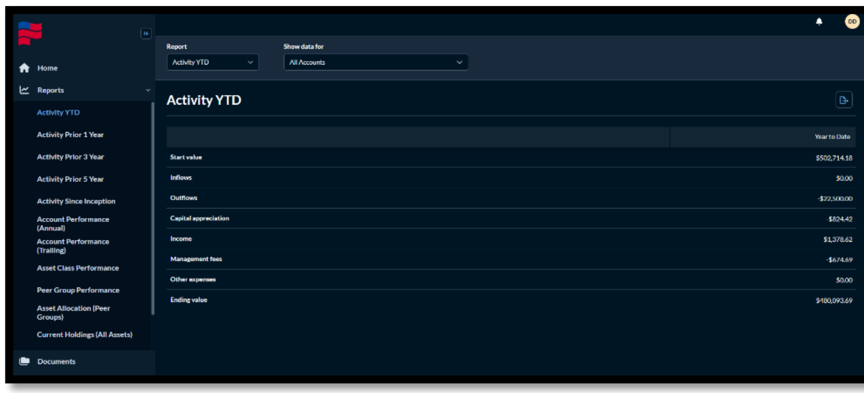
Documents

Accounts

Contact Us

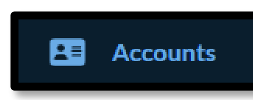
Among other things, you'll be able to see the performance of your account compared to the amount you invested (minus any withdrawals), your current asset allocation, your current mutual fund holdings and fund-level performance, and our fee.

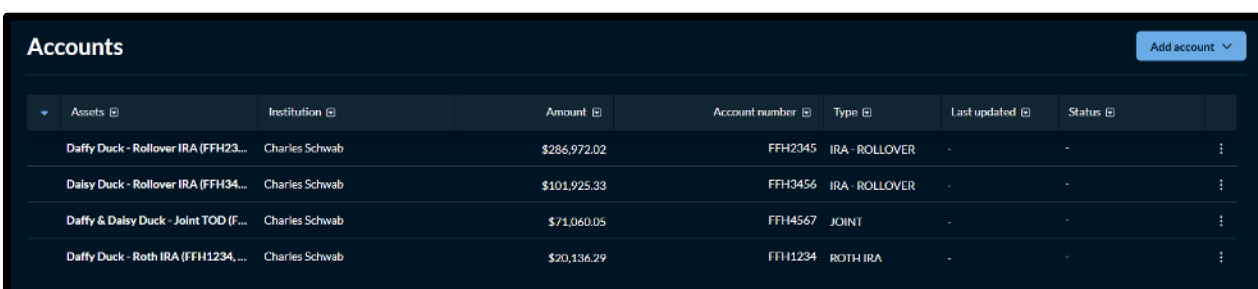




Accounts

In the Accounts tab, you can see all your accounts through Financial Freedom House. Now you can also manually add in any assets or liabilities that are not managed under us, making it easy to view all your assets and liabilities in one spot.

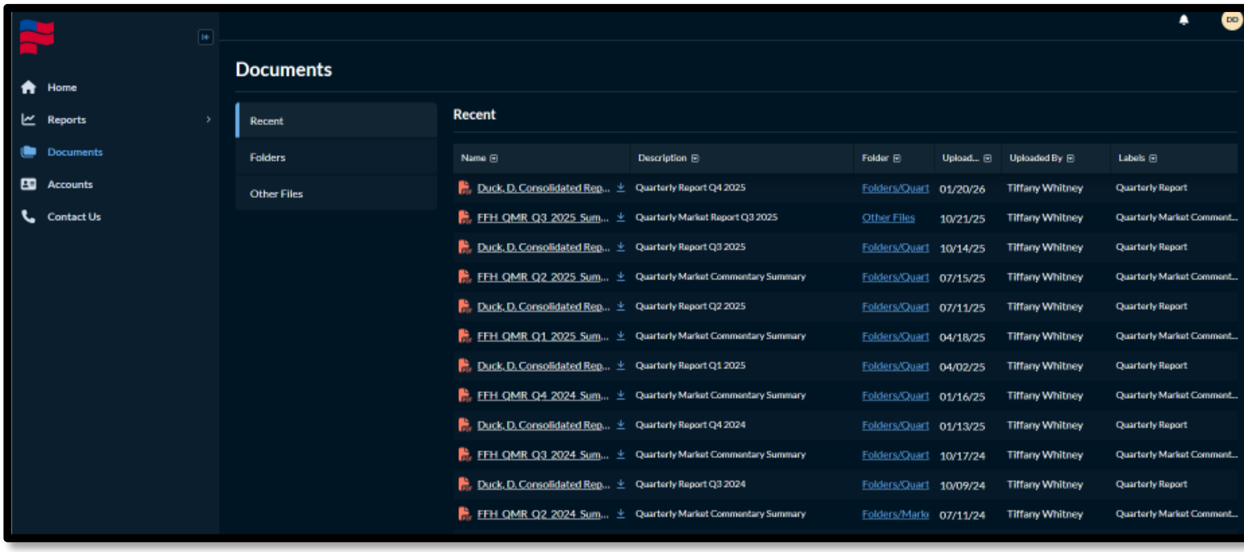




If you would like to add in you own assets and liabilities, you can do so by using the blue drop-down button in the upper right corner of the screen that says, "**Add account**".

Viewing Documents in the Document Vault

To access your document vault, simply click on the word "**Documents**" in the left menu bar. This will take you to a screen that lists all the documents we've posted for you.



You can sort this list of documents by using the dropdown arrows next to each header at the top of the screen. You can also sort by "Name", "Description", and "Uploaded" by clicking on these labels at the top of the document list. You may also sort by folder, by clicking on the "**Folders**" button under "Recent".

To download a copy of the document you want to view, just click the blue icon next to the file name. When you download a document, the original stays in the vault so you can download it again in the future.

Helpful Hint

If you're ever lost in the system and want to get back to the main screen, just click on the little house in the upper left corner.