E-BRIDGE OVERVIEW

Connecting Your Financial Life

DeCesare
Retirement Specialists
Transitioning You from Work through Life.

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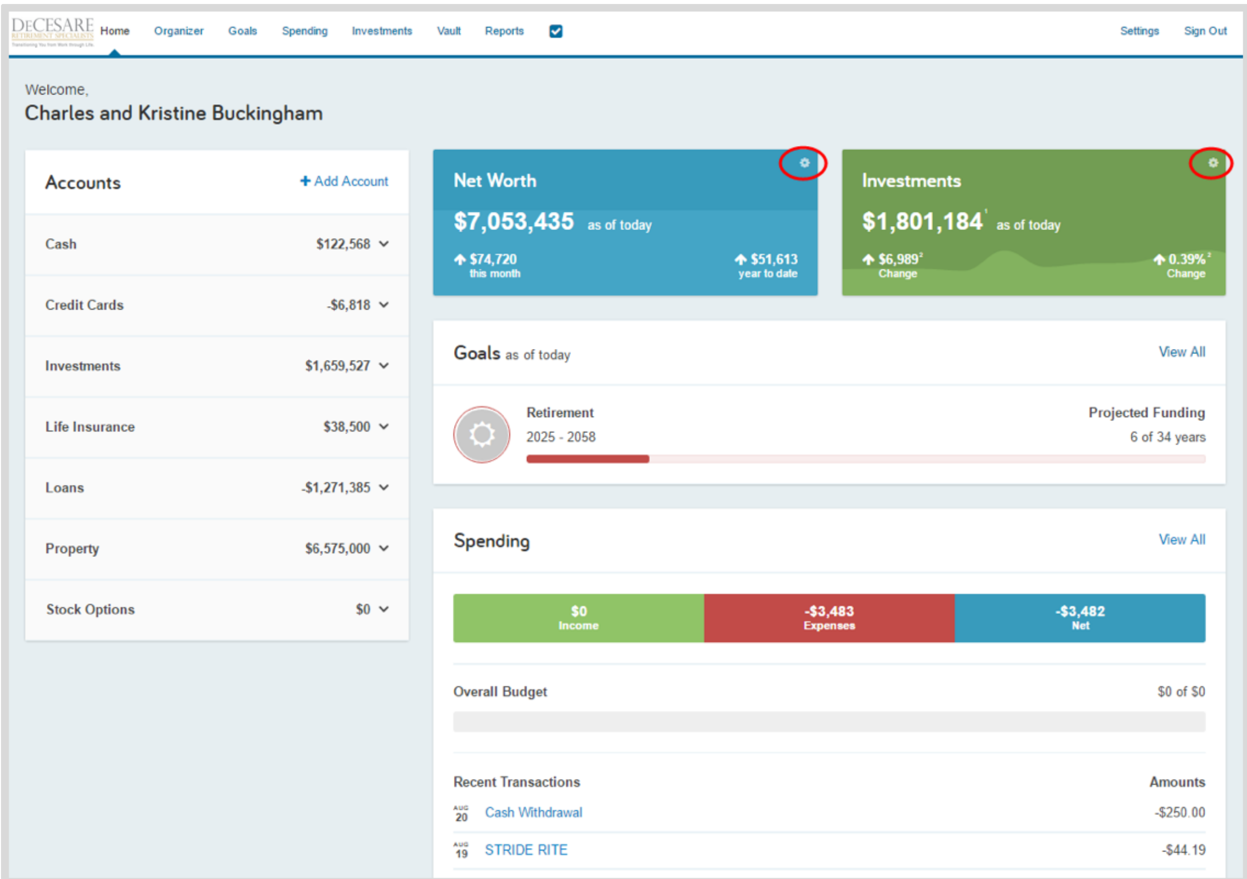
E-BRIDGE

Connecting Your Financial Life

This training guide will provide you with an overview of the tools and features of your new E-Bridge website! E-Bridge will help you organize your financial life and stay connected with your finances in one simple consolidated view.

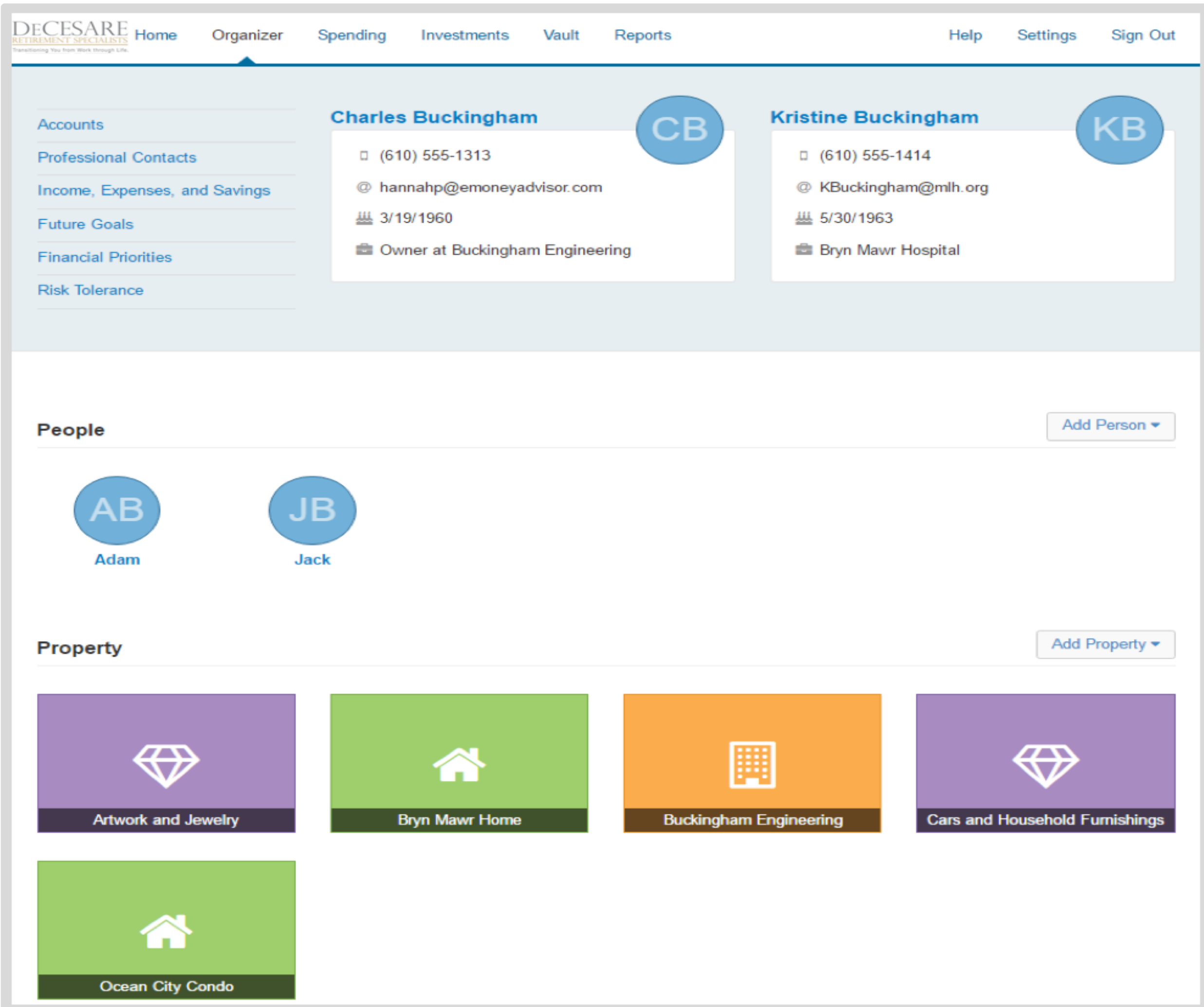
Before your first login, you will be prompted to establish 3 security questions and set up 2 Factor Authentication.

1. Your **Home** page is a living snapshot of your financial wellbeing. The Home page is a high-level view of your financial information. This page is divided into separate tiles that represent the information contained within a particular section of the application.

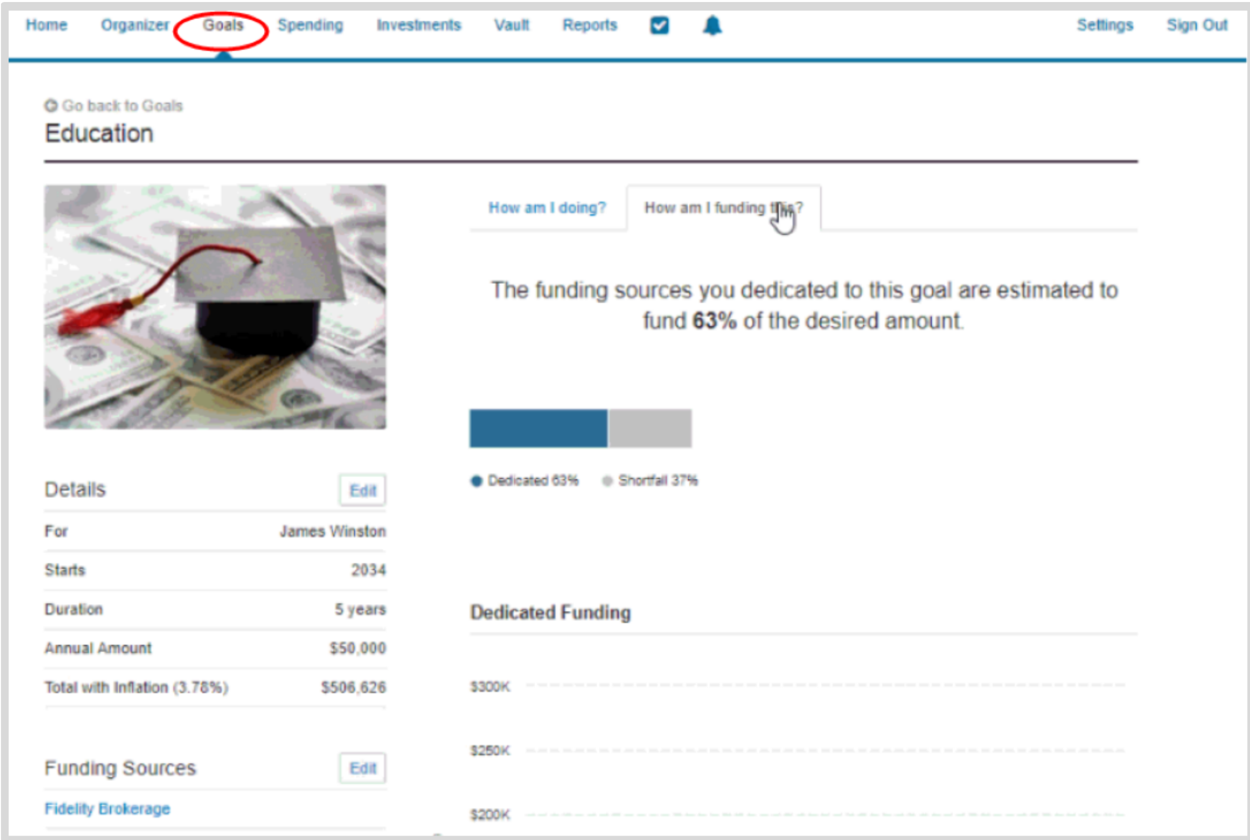


Begin customizing your experience by clicking the **gear** icon in your **Net Worth** and **Investments** tiles!

2. The **Organizer** will help you to consolidate all of your important financial information into one place. Click the different sections to add and edit the related information. Here you can add your accounts, financial data, people and property. The information included here will be used to populate other areas of the application, including the Home page.



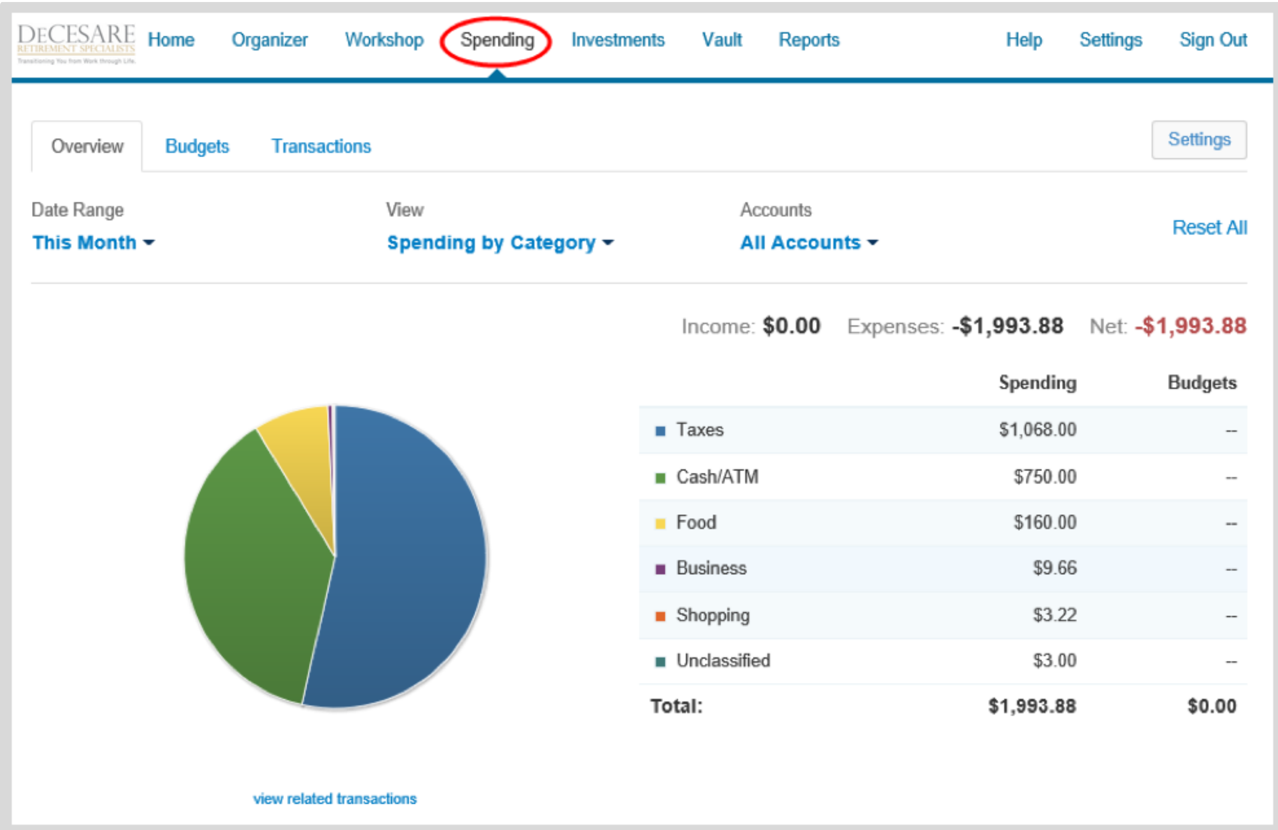
3. The **Goals** page allows you to see how your financial goals impact your holistic financial outlook. You can quickly drill into the details of each one of your goals for insight into projected coasts, funding, and suggested actions to improve your results!



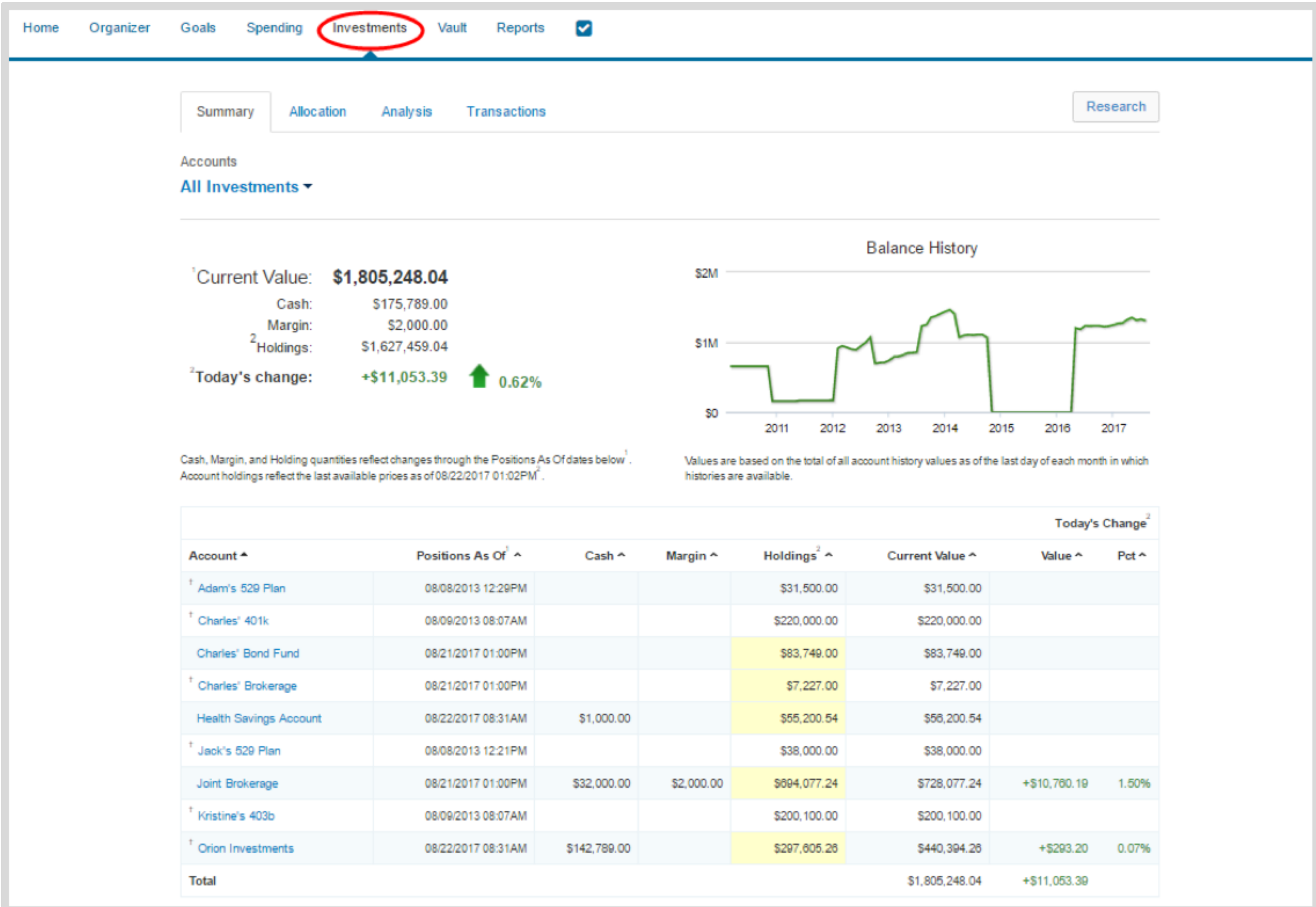
You can add the following goal types:

- Retirement Home
- Travel
- Education
- Home Improvement
- Wedding Celebration
- Elder Care
- Family Support
- Alimony
- New Car
- Other

4. The **Spending** tab gives you a clear view of what you're spending each month. If there is no information on this screen, it's because a bank account or credit card needs to be added to Accounts in your **Organizer**. Spending includes an Overview tab, Budgets tab, and Transactions tab. Use these pieces together to create the most accurate view of your spending and your current budget.

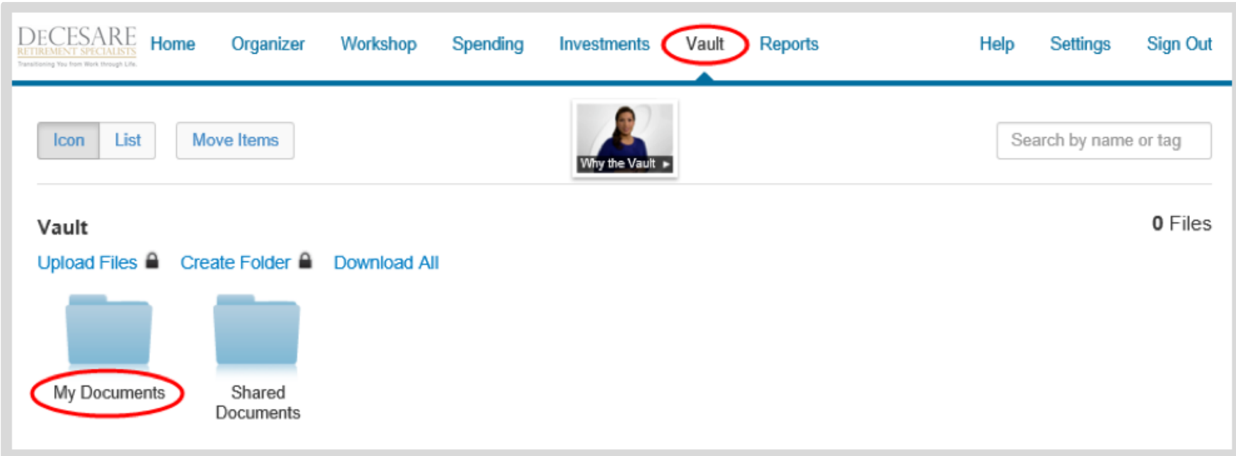


5. The **investments** tab is made up of four components: Summary, Allocation, Analysis, and Transactions. These will provide you with an overall view of your investments as well as the ability to drill into individual accounts & asset breakdowns.

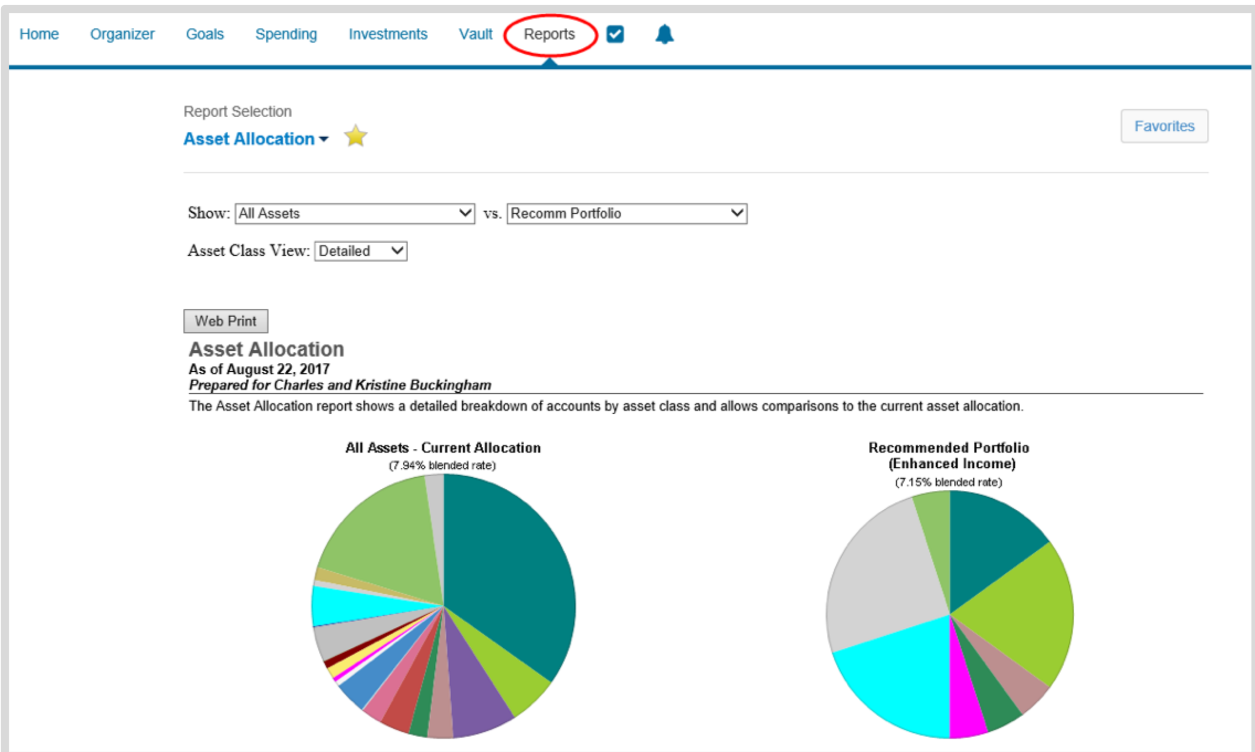


						Today's Change	
Account	Positions As Of	Cash	Margin	Holdings	Current Value	Value	Pct
Adam's 529 Plan	08/08/2013 12:29PM			$31,500.00	$31,500.00		
Charles' 401k	08/09/2013 08:07AM			$220,000.00	$220,000.00		
Charles' Bond Fund	08/21/2017 01:00PM			$83,749.00	$83,749.00		
Charles' Brokerage	08/21/2017 01:00PM			$7,227.00	$7,227.00		
Health Savings Account	08/22/2017 08:31AM	$1,000.00		$55,200.54	$56,200.54		
Jack's 529 Plan	08/08/2013 12:21PM			$38,000.00	$38,000.00		
Joint Brokerage	08/21/2017 01:00PM	$32,000.00	$2,000.00	$694,077.24	$728,077.24	+$10,760.19	1.50%
Kristine's 403b	08/09/2013 08:07AM			$200,100.00	$200,100.00		
Orion Investments	08/22/2017 08:31AM	$142,789.00		$297,605.26	$440,394.26	+$293.20	0.07%
Total					$1,805,248.04	+$11,053.39	

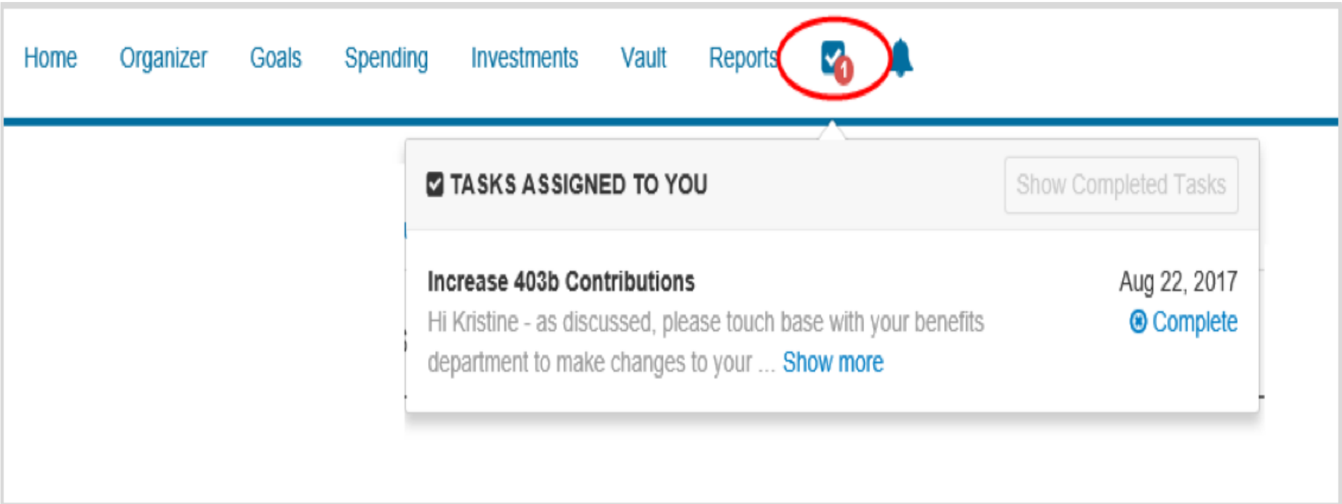
6. The **Vault** tab is a repository which files are stored by DeCesare Retirement Specialists for your review, and where you can store files. To upload a file, click the **Upload Files** link. The **My Documents** folder is hidden from your advisor. If you want your advisor to see a document, upload into the **Shared Documents** folder.



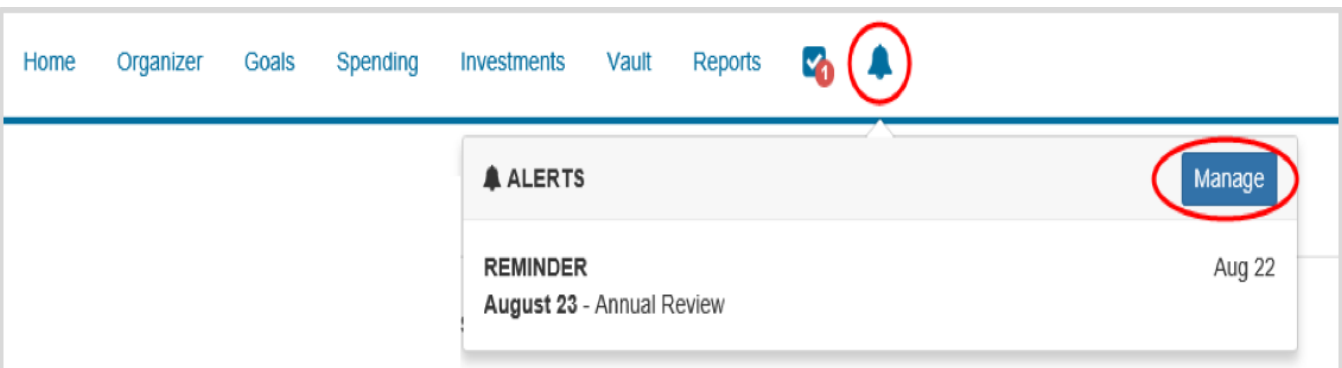
7. The **Reports** tab provides you with a series of reports about your financial situation.



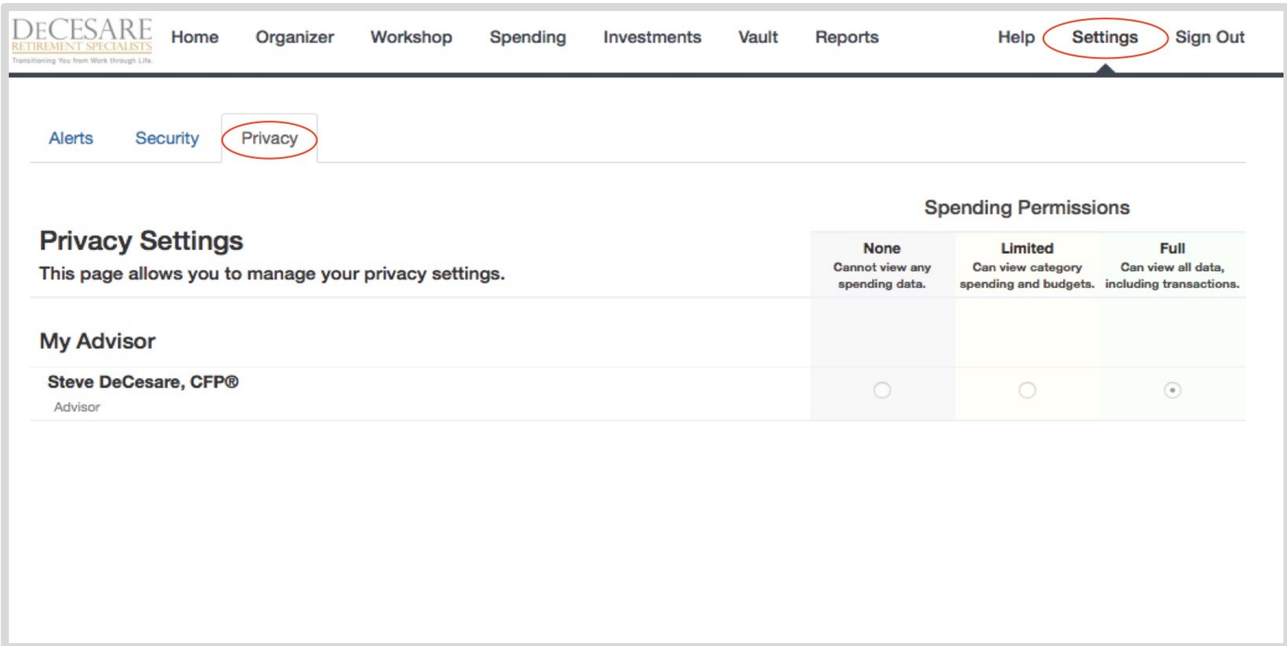
8. The **Check Box** icon will alert you of any tasks assigned to you. Click the Complete link when you've finished the task to notify DeCesare Retirement Specialists.



9. The **Bell** icon allows you to view any triggered alerts. Click **Manage** to set up alert parameters!



10. The **Settings** page is where you can set up alerts, update your security information (passwords, 2-Factor Authentication and Security Questions), and permission DeCesare Retirement Specialists to see spending information through the Privacy tab.



Please call DeCesare Retirement Specialists at 856.235.3830 for assistance with setting up your custom E-Bridge website and for tips on how to use this tool to help you make more informed decisions for your financial life.

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