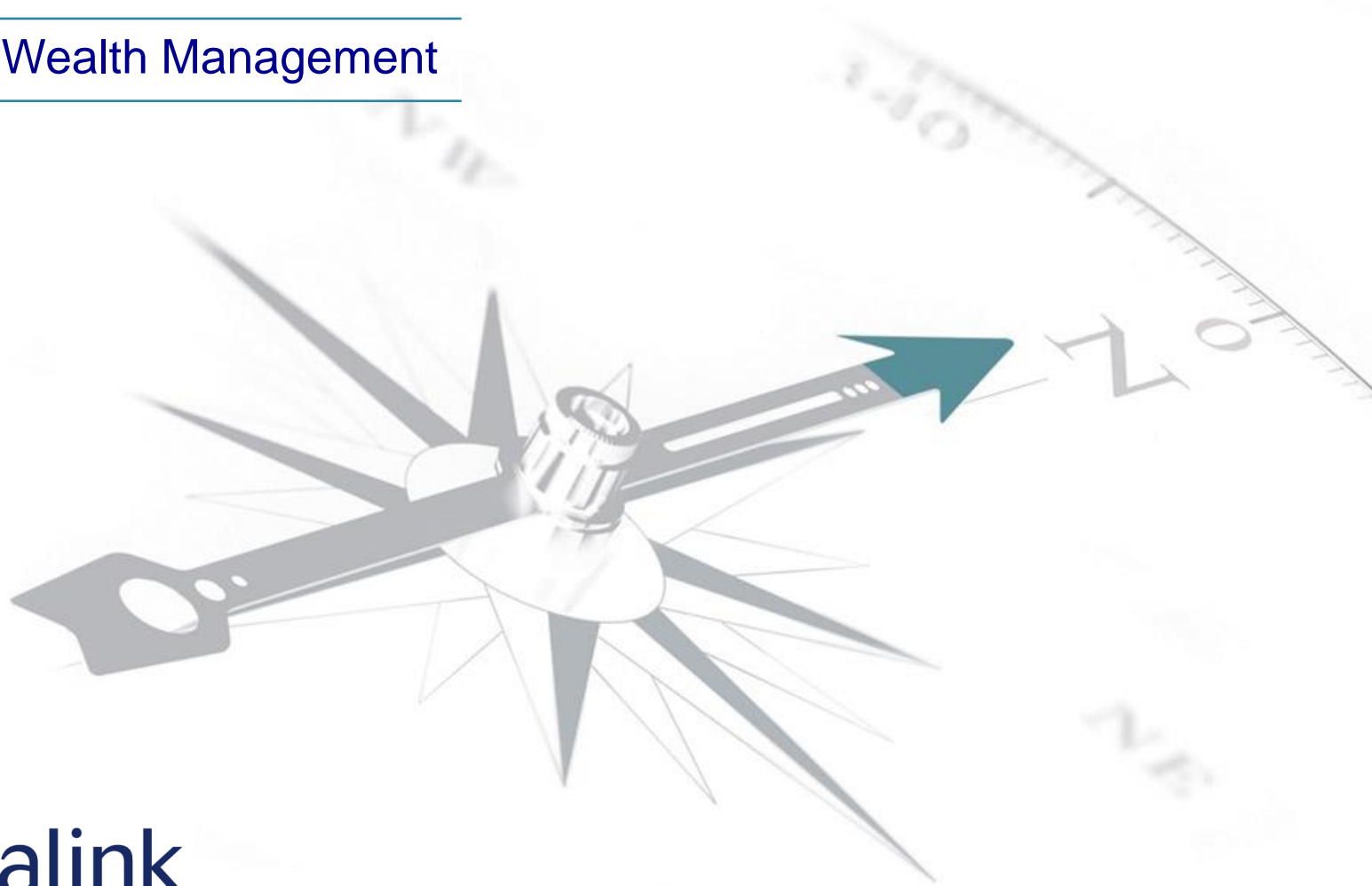


Client Online Access

Intralink Wealth Management



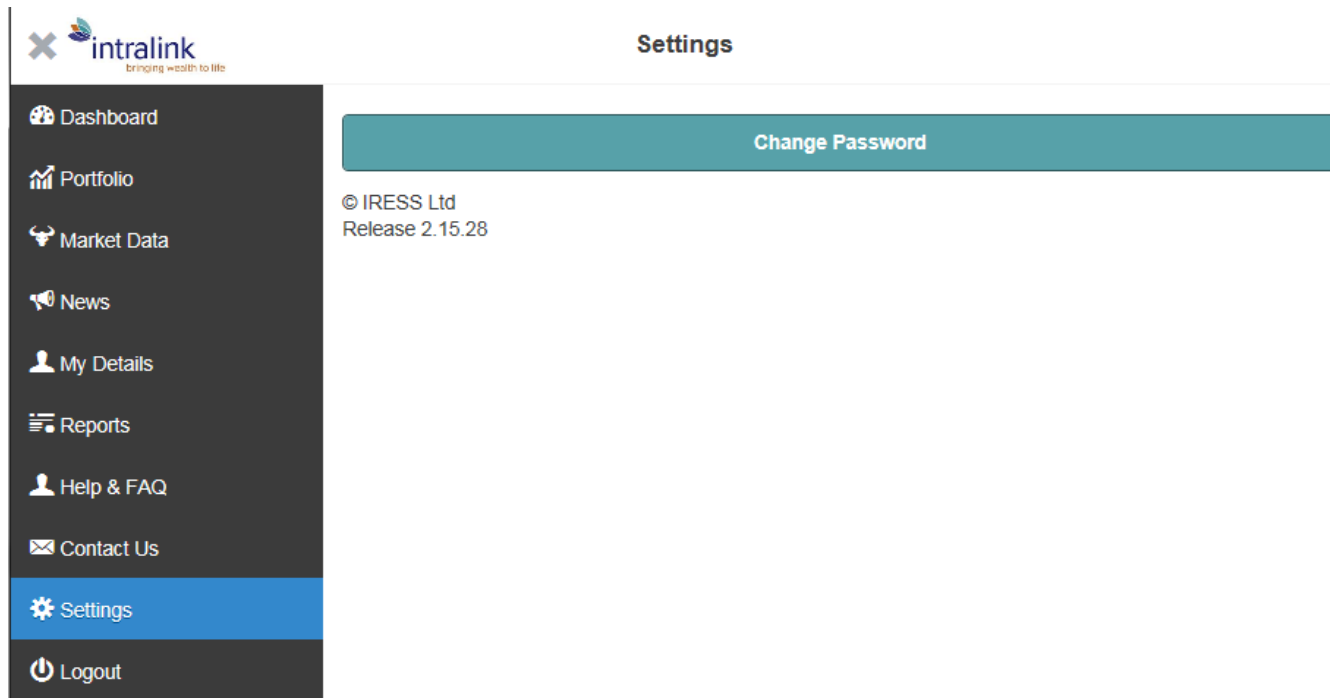
To Log in

- The first time you login after the upgrade, it will take you to the updated log in page. You can then log into the new website using your existing username and password. You will be able to use these same details to login to the mobile app.

The screenshot displays the intralink website interface. At the top, there is a header with contact information: info@intralink.com.au, (03) 9629 1100, and (03) 9629 9100. A search bar is also present. The main navigation menu includes HOME, ABOUT US, OUR SERVICES, WHY INTRALINK, NEWS, and CONTACT US. The central banner features the text "Securing your financial independence" and "Intralink Wealth Management" over a background image of a lighthouse. Below the banner, there are three columns: "NEWSLETTER" with a "SUBSCRIBE" button, "NEWS" with a list of articles, and "ACCOUNT LOGIN" which is highlighted with a red box. The "ACCOUNT LOGIN" section contains fields for "User ID:" and "Password:", a "Forgot Password?" link, and a "Login" button.

Change your password

- Click on Settings at the bottom of your main menu and the following screen will appear



- Click “Change Password” and a pop-up window will appear

Change your password

- Enter your old password and then your nominated new password twice and click on save

Change Password

Old Password

New Password

Confirm Password

Navigating through client access

- Left side menu will always appear while you are logged into Client Access to make this site user friendly.

The screenshot displays the intralink client access dashboard. The top left features the intralink logo with the tagline 'bringing wealth to life'. The top right shows the 'Dashboard' title and a user profile icon. A dark grey left sidebar contains navigation options: Dashboard, Portfolio, Market Data, News, My Details, Reports, Help & FAQ, Contact Us, Settings, and Logout. The main content area is divided into several sections:


- Accounts:** A table listing accounts for 'Test, John', 'Test, Jann', and 'John Test Trust' with their respective balances in AUD.
- Life Insurance:** A table showing cover details for 'Test, John' and 'Test, Jann', including 'Life' and 'TPD' policies with their sum insured amounts.
- Portfolio Summary:** A summary card showing a total value of \$3,829,435.38 AUD, a 33.89% increase, and breakdowns for Investments (\$3,140,338.14 AUD) and Cash (\$689,097.24 AUD).
- Asset Class Allocations:** A treemap chart showing the distribution of assets across Domestic Equity, Domestic Fixed Interest, Domestic Cash, and Domestic Property.

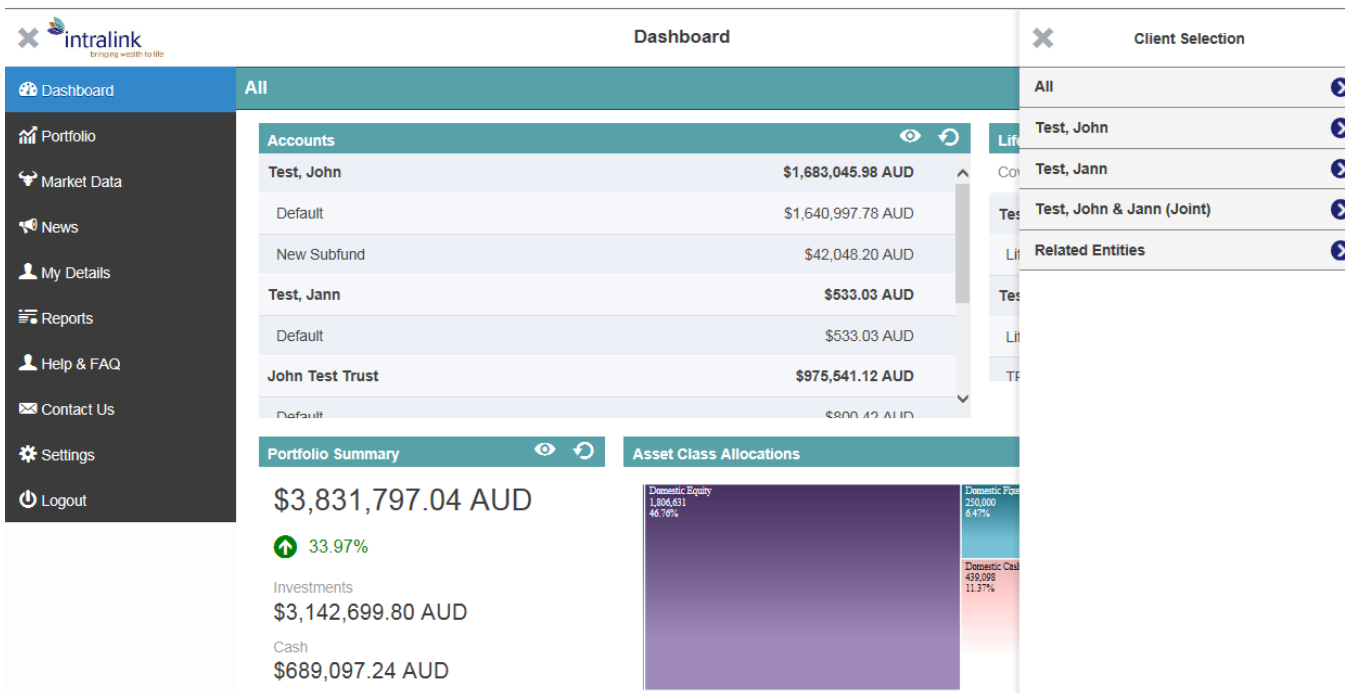
Account Name	Balance (AUD)
Test, John	\$1,679,928.66
Default	\$1,637,809.32
New Subfund	\$42,119.34
Test, Jann	\$532.98
Default	\$532.98
John Test Trust	\$976,103.23
Default	\$804.97

Client Name	Policy Type	Sum Insured (AUD)
Test, John	Life	\$1,500,000.00
Test, Jann	Life	\$540,000.00
Test, Jann	TPD	\$540,000.00

Category	Value (AUD)	Percentage
Domestic Equity	1,806,631	46.76%
Domestic Fixed Interest	250,000	6.47%
Domestic Cash	439,098	11.37%
Domestic Property	1,353,605	35.04%

Dashboard

- Provides a general overview of your portfolio
- You are able to select which entity(s) you wish to view by selecting the filter icon on the top right hand corner. 



The screenshot displays the intralink dashboard interface. On the left is a navigation menu with options: Dashboard, Portfolio, Market Data, News, My Details, Reports, Help & FAQ, Contact Us, Settings, and Logout. The main content area is titled 'Dashboard' and features a 'Client Selection' dropdown menu on the top right, currently set to 'All'. Below this is a table of accounts with columns for entity name and value in AUD. The table lists accounts for 'Test, John', 'Default', 'New Subfund', 'Test, Jann', 'Default', and 'John Test Trust'. Below the table are two summary cards: 'Portfolio Summary' showing a total value of \$3,831,797.04 AUD with a 33.97% increase, and 'Asset Class Allocations' showing a pie chart with categories like Domestic Equity (44.10%), Domestic Fixed (6.47%), and Domestic Cash (11.37%).

Accounts	Value (AUD)
Test, John	\$1,683,045.98
Default	\$1,640,997.78
New Subfund	\$42,048.20
Test, Jann	\$533.03
Default	\$533.03
John Test Trust	\$975,541.12
Default	\$800.42

Portfolio Summary

\$3,831,797.04 AUD

↑ 33.97%

Investments
\$3,142,699.80 AUD

Cash
\$689,097.24 AUD

Asset Class Allocations

Asset Class	Value (AUD)	Percentage
Domestic Equity	1,696,631	44.10%
Domestic Fixed	250,000	6.47%
Domestic Cash	439,099	11.37%

- You are able to select multiple entities to view on your dashboard

Dashboard

- Each widget has symbols which allow users to:



View your portfolio in greater detail



Expand widget to view full screen



Reduce widget to original size



Reload data



Select which entity(s) you wish to view

Portfolio

- Allows user to view portfolio in two different views:
Summary View

The screenshot displays the 'Portfolio Summary' view in the intralink application. The interface includes a sidebar with navigation options: Dashboard, Portfolio (selected), Market Data, News, My Details, Reports, Help & FAQ, Contact Us, Settings, and Logout. The main content area is titled 'Portfolio Summary' and features a 'Summary' tab (highlighted with a red box) and an 'Asset Allocation' tab. The 'Total Value' is \$3,831,797.04 AUD, with a 33.97% increase. It shows 'Investments' at \$3,142,699.80 AUD and 'Cash' at \$689,097.24 AUD. A donut chart visualizes the asset class allocations. Below this, there are two smaller donut charts for individual portfolios: 'Test, John' (\$1,683,045.98 AUD) and 'Test, Jann' (\$533.03 AUD). The 'Asset Class Allocations' section shows a treemap with four categories: Domestic Equity (1,806,631, 46.76%), Domestic Fixed Interest (250,000, 6.47%), Domestic Cash (439,098, 11.37%), and Domestic Property (1,333,605, 35.04%). The 'Transactions' section includes filters for 'View All', 'All', and 'Dates', and a table listing transactions for various ASX codes.

Portfolio Summary

Total Value: \$3,831,797.04 AUD
33.97% ↑
Investments: \$3,142,699.80 AUD
Cash: \$689,097.24 AUD

Asset Class Allocations

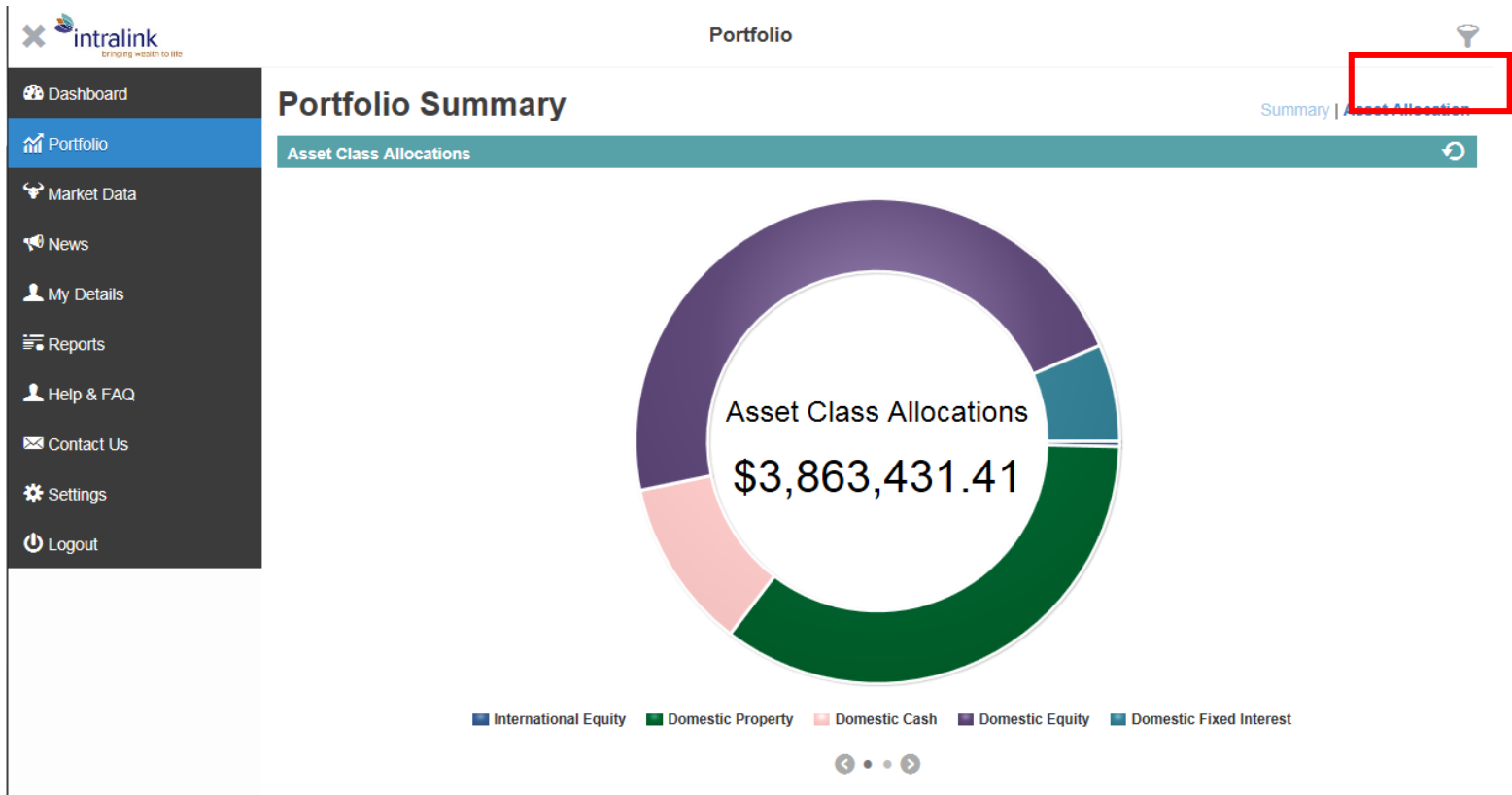
Asset Class	Value (AUD)	Percentage
Domestic Equity	1,806,631	46.76%
Domestic Fixed Interest	250,000	6.47%
Domestic Cash	439,098	11.37%
Domestic Property	1,333,605	35.04%

Transactions

Position	Type	Trade Date	Amount
SEK.ASX	Income	16/09/2015	\$373.32 AUD
BHP.ASX	Income	09/09/2015	\$3,744.75 A...
WOW.ASX	Income	09/09/2015	\$1,630.80 A...
SHL.ASX	Income	09/09/2015	\$522.75 AUD
CSL.ASX	Income	07/09/2015	\$621.84 AUD

Portfolio

- Asset Allocation view



- Click the arrows underneath to view data in a different graph

Market Data

- Allows you to watch the market activity of shares on the ASX by adding them to your personal “watchlist”:
 - Type ASX code into the Code box and click on add
 - Once added, choices can be removed or updated

The screenshot displays the intralink Market Data interface. On the left is a navigation sidebar with options: Dashboard, Portfolio, Market Data (highlighted), News, My Details, Reports, Help & FAQ, Contact Us, Settings, and Logout. The main content area is titled 'Market Data' and is divided into two sections. The 'Watchlist' section, highlighted with a red box, contains a text input field with 'eg. IRE.ASX', an 'Add' button, and a message 'No watchlist data found.' The 'Market Activity' section features a table with columns for Security, Last Price, +/-, %, Volume, and Value. The table lists various ASX securities with their respective prices and changes.

Security	Last Price	+/-	%	Volume	Value
AHN	\$0.01	0.01	71.43%	56,131.00	\$641.31
GLA	\$0.00	0.00	50.00%	40,000.00	\$120.00
NWE	\$0.00	0.00	50.00%	1,264,331.00	\$3,792.99
CIA	\$0.18	0.05	34.62%	284,696.00	\$49,100.06
SRQ	\$0.00	0.00	33.33%	1,425,000.00	\$5,700.00
VKA	\$0.02	0.00	30.77%	539,601.00	\$7,638.93
AUZ	\$0.01	0.00	25.00%	136,810.00	\$684.05
STA	\$0.01	0.00	25.00%	108,820.00	\$544.10
TMX	\$0.01	0.00	25.00%	7,618.00	\$38.09
UEQ	\$0.01	0.00	25.00%	1,228,000.00	\$6,037.00
ESI	\$0.02	0.00	23.68%	21,103,519.00	\$504,849.30

News

- Linked to the Intralink website that shows all new articles published for your interest.

intralink
bringing wealth to life

News

Made in the USA – A Manufacturing Resurgence
Intralink Wealth Management
11/11/2015 8:58:55 AM

In a speech he made at a North Carolina auto parts plant this month, US President Obama said that he foresees a “resurgence of American manufacturing”. “We don’t give up. We get up. We innovate. We adapt. We learn new skills. We keep going,” President Obama said. There is some very clear evidence in support [...]

Ripple Payment System
Intralink Wealth Management
28/10/2015 11:00:13 PM

Commonwealth Bank, ANZ and Westpac announced recently that they are testing out payment technology from the US-based company Ripple Labs. The news comes after CBA made headlines around the world by presenting itself as the first major bank to go public with its trials of Ripple for transferring payments between its subsidiaries. CBA’s chief information [...]

Some Thoughts by Warren Buffett on Investing
Intralink Wealth Management
05/10/2015 11:00:30 PM

Each year legendary investor Warren Buffett pens a letter to his shareholders and invariably it contains priceless wisdom couched in everyday language. This year, one section of the letter is devoted to “Some Thoughts About Investing”. So in the words of Warren Buffett: “This tale begins in Nebraska. From 1973 to 1981, the Midwest experienced [...]

Uber for Health Care
Intralink Wealth Management
20/09/2015 10:00:46 PM

Several start-up businesses in the United States are using developments in technology to bring back the storied concept of the doctor house call or “in-person visits” since they can take place anywhere. These businesses are fuelled by a convergence of trends, including growing interest in the so-called sharing economy, where technology connects providers with excess [...]

Microsoft Chart
Intralink News
29/09/2015 2:10:56 PM

China’s Economic Transition
Intralink Wealth Management
20/08/2015 10:00:17 PM

A very large and growing economic base China joined a very exclusive club last year. Its economic output as measured by gross domestic product exceeded US\$10 trillion, making it only the second country to achieve...

Disruptive Innovation
Intralink Wealth Management
25/08/2015 10:00:53 PM

Disruptive innovation can come in any field or emerge from any scientific discipline, but they share four characteristics: The innovation is rapidly advancing or experiencing breakthroughs Disruptive innovation and technologies typically demonstrate a rapid rate of change in capabilities in terms of price/performance relative to substitutes, or they experience breakthroughs that drive accelerated...

My Details

- Summary of your personal information:

Key Details		
	Client	Partner
Title	Prof	Mrs
Surname *	Test	Test
First Name	John	Jann
Preferred Name	John	Jann
Date of Birth		
Preferred Phone		
Preferred Email		
Street	Level 14 470 Collins Street	
Suburb	MELBOURNE	MELBOURNE
State	VIC	
Postcode	3000	

- Please contact your Adviser and/or Client Service Assistant should your details need to be updated. Details are found under “Contact Us” in your main menu.

Reports

- Allows user to generate the following reports for all related entities by selected the blue arrow next to the report you wish to generate:

intralink <small>bringing wealth to life</small>		Reports	
Dashboard	My Portfolio Valuation - Today	Valuation	➤
Portfolio	My Unrealised Capital Gains	Tax	➤
Market Data	My Cash Transactions - Current Financial Year	Transactions	➤
News	My Income Summary - Last Financial Year	Tax	➤
My Details	My Asset Allocation	Asset Allocation	➤
Reports	My Cash Transactions - Last Financial Year	Transactions	➤
	My Income Summary - Current Financial Year	Tax	➤
	My Portfolio Valuation - Last Financial Year	Valuation	➤

Reports

- User will then be able to select which entity(s) and format to generate the selected report.
- Available formats: PDF (protected document file) or CSV (excel spreadsheet)

The screenshot displays the 'Generate Report' page in the intralink system. On the left is a dark sidebar with navigation icons and labels: Dashboard, Portfolio, Market Data, News, My Details, Reports (highlighted in blue), Help & FAQ, Contact Us, Settings, and Logout. The main content area has the intralink logo and 'Reports' button at the top left, and the title 'Generate Report' at the top right. Below the title is the heading 'My Portfolio Valuation - Today'. The 'Portfolios:' section contains a list of six items, each with a checkbox: 'Test, John' (checked), 'Test, Jann' (checked), 'John & Jann Test (Joint)', 'John Test Pty Ltd', 'John Test Trust', and 'Test SF'. The 'Date:' field is set to '14 Dec 2015'. The 'Format:' dropdown menu is set to 'pdf'. A large blue 'Generate Report' button is at the bottom.

Portfolios:
<input checked="" type="checkbox"/> Test, John
<input checked="" type="checkbox"/> Test, Jann
<input type="checkbox"/> John & Jann Test (Joint)
<input type="checkbox"/> John Test Pty Ltd
<input type="checkbox"/> John Test Trust
<input type="checkbox"/> Test SF

Date: 14 Dec 2015

Format: pdf

Generate Report

Help & FAQ

- Links available to:
 - Video tutorial on how to navigate Online Access
 - Intralink Client Online Access User Guide
 - Frequently Asked Questions

Help & FAQ

ONLINE HELP

Welcome to our **HELP** and **TUTORIAL** page.

User Guide: [Click Here](#)

Video Tutorial: [Click Here](#)

How can I track my portfolio?

You will be able to view online all the relevant details such as your current portfolio valuation; current holdings, transactions, tax positions, etc. on a 24/7 basis. At fi

What reports are available?

The following reports are available:

- Portfolio Valuation
- Unrealised CGT report
- Cash Transactions – current and last financial years
- Asset Allocation
- Income Summary
- Enhanced Transaction Summary

Why is there a difference between the portfolio page and the portfolio value when I run the report?

This is simple the difference in the price data used. The portfolio page is utilising live data if the market is open while the portfolio valuation report is utilising the clo

Contact Us

- Click on the envelope to view your Adviser and Client Service Assistant email address. Click on the telephone to view our best contact number.



Contact Us

Dashboard

Portfolio

Market Data

News

My Details

Reports

Help & FAQ

Contact Us

Settings

Logout

Sharkey, Paul
Client Adviser

psharkey@intralink.com.au

Settings

- Here you can change your password and detailed above.

Change Password

Logout

- Ensure you click on 'Logout' once you have finished using Client Access.

Confirm Logout

Are you sure you want to logout?

Yes

No

Any questions

- If you have any questions, please don't hesitate to contact our office on the details below:

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Melbourne Victoria 3000

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E intralink@intralink.com.au

W www.intralink.com.au