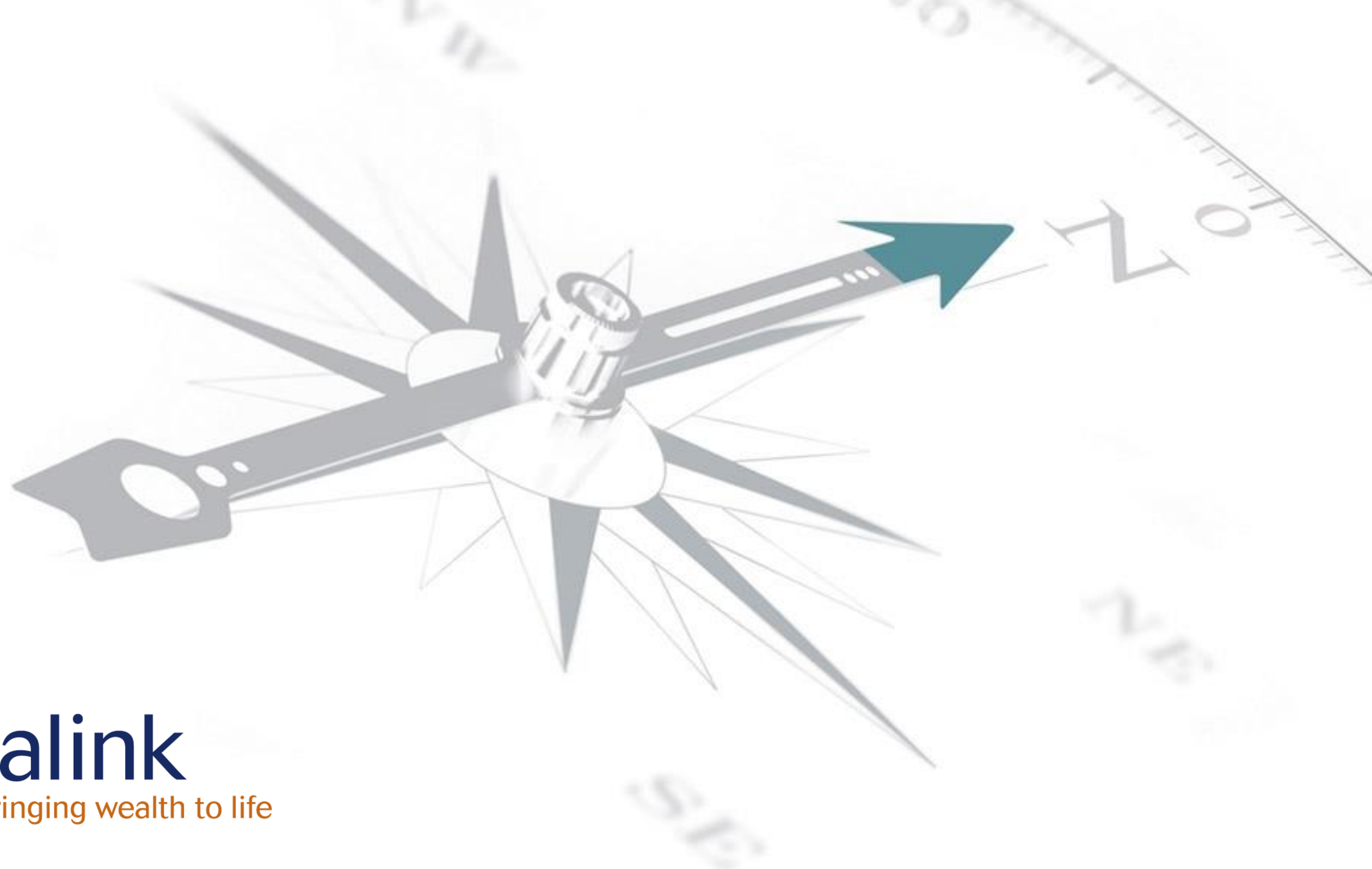
Client Online Access

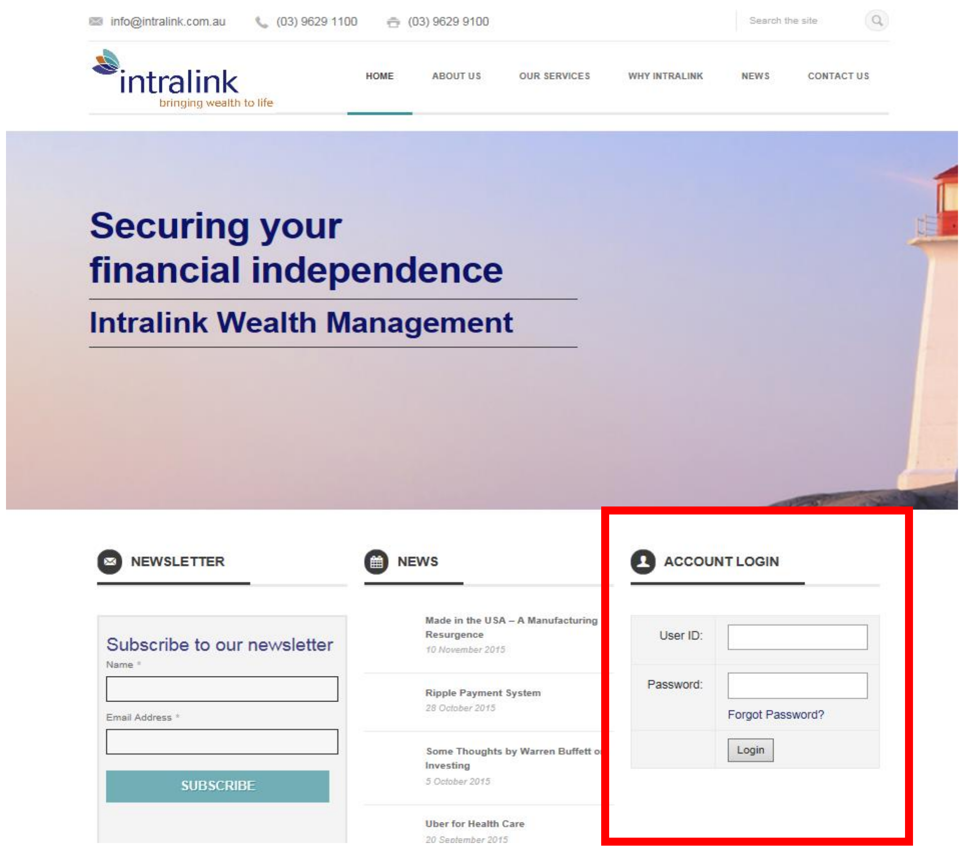
Intralink Wealth Management



intralink
bringing wealth to life

To Log in

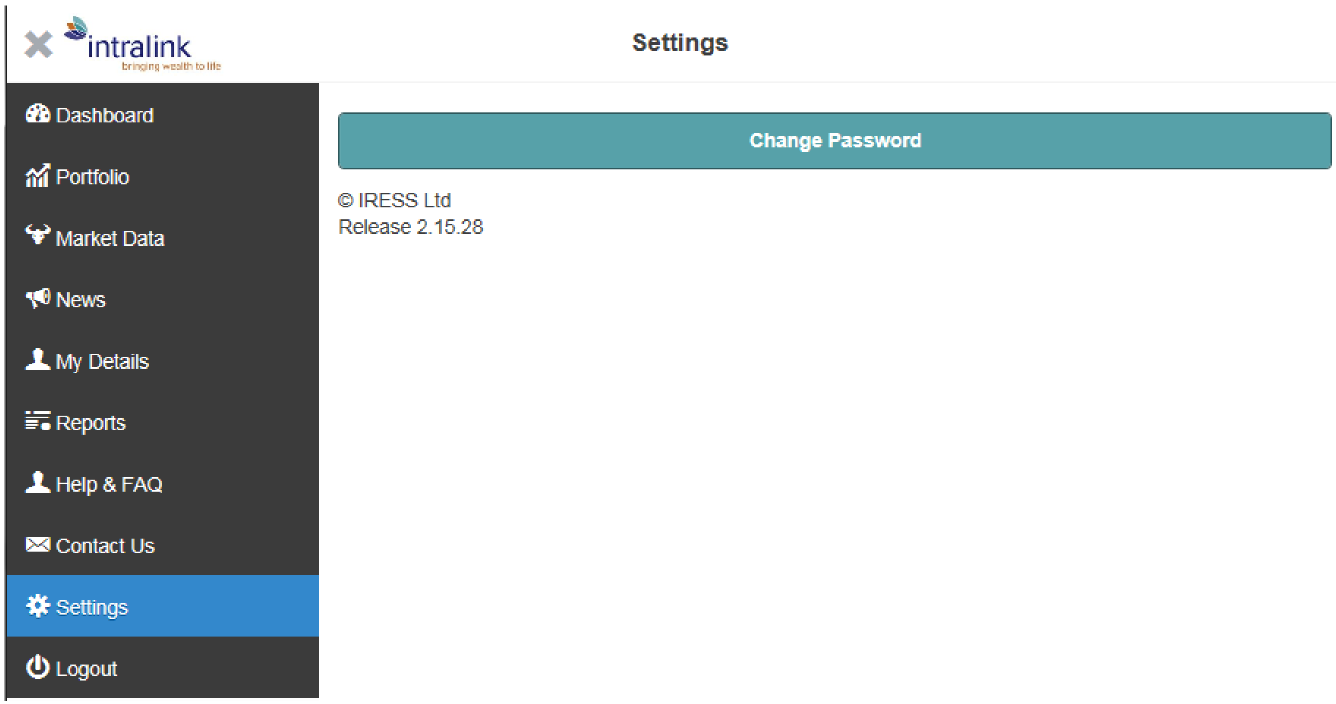
- The first time you login after the upgrade, it will take you to the updated log in page. You can then log into the new website using your existing username and password. You will be able to use these same details to login to the mobile app.



intralink
bringing wealth to life

Change your password

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

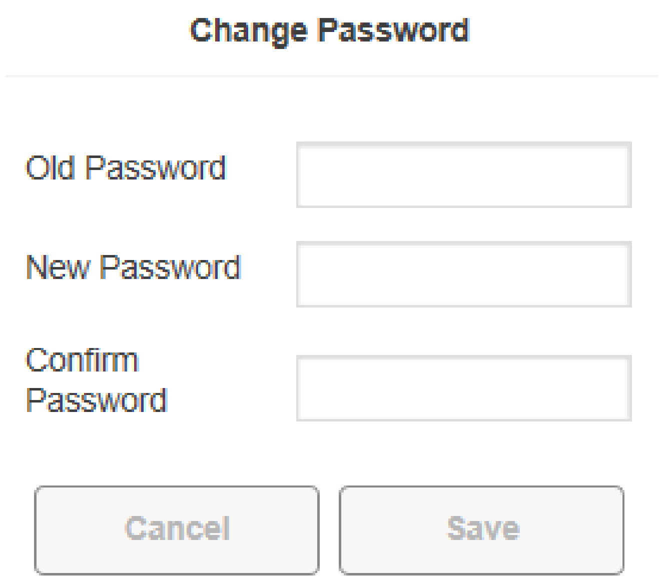


- Click "Change Password" and a pop-up window will appear

intralink
bringing wealth to life

Change your password

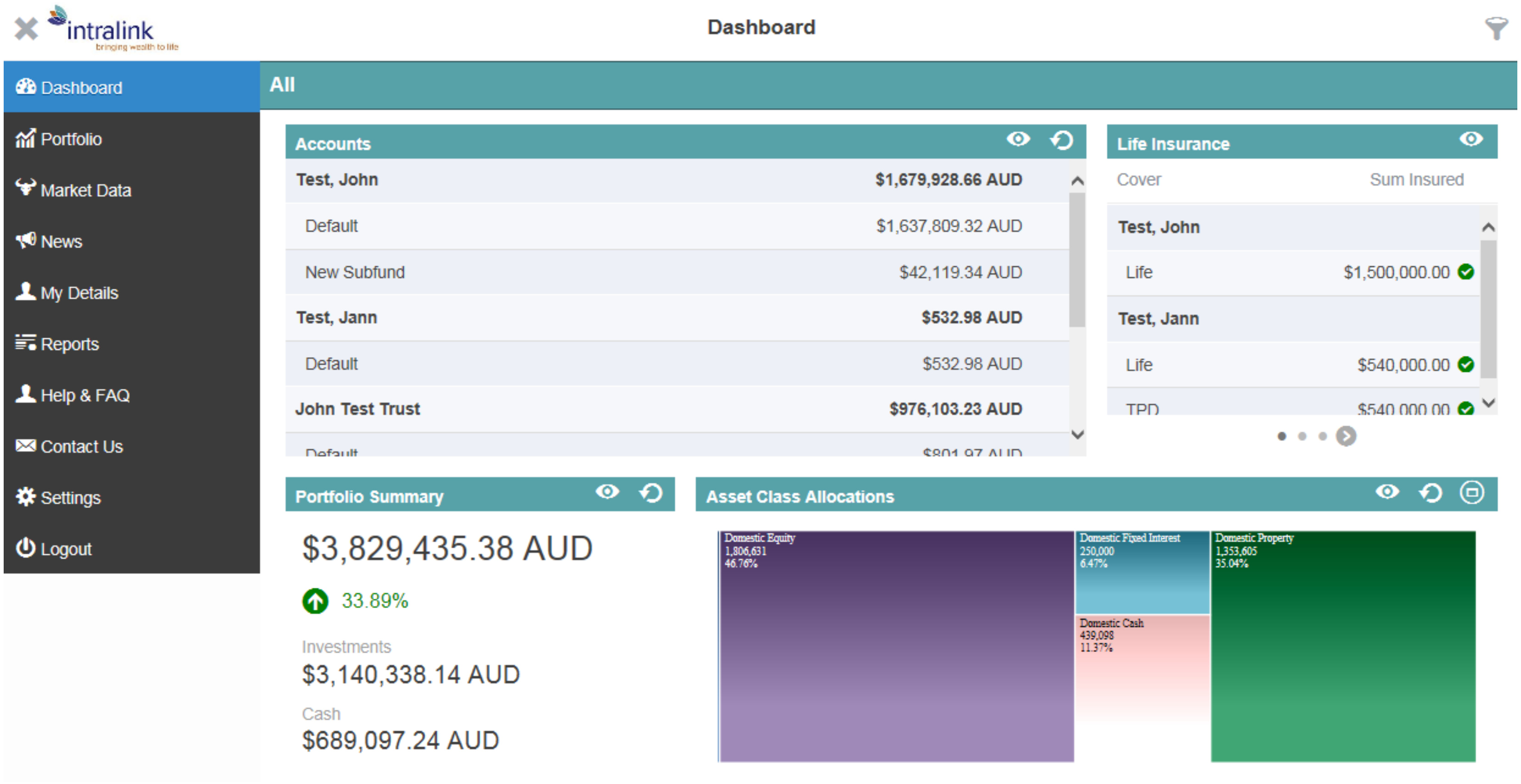
- Enter your old password and then your nominated new password twice and click on save



intralink
bringing wealth to life

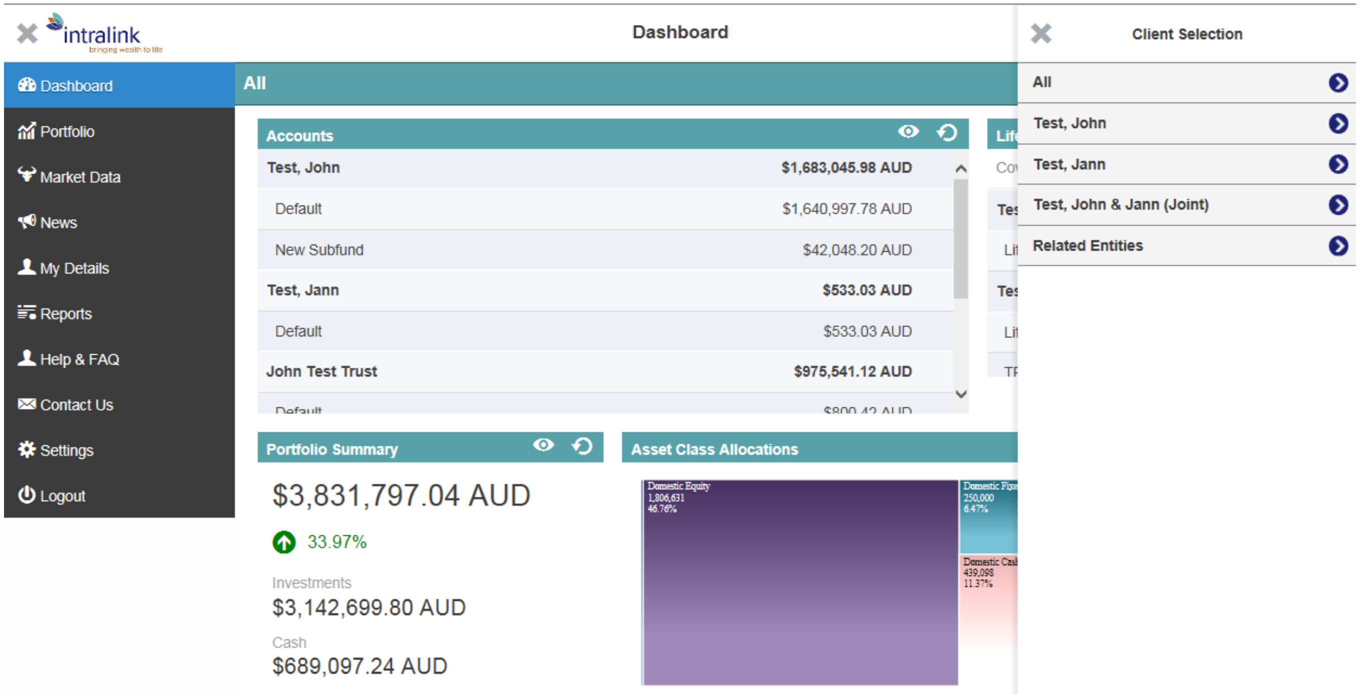
Navigating through client access

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



Dashboard

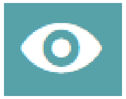
- Provides a general overview of your portfolio
- You are able to select which entity(s) you wish to view by selecting the filter icon on the top right hand corner.



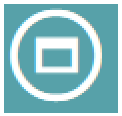
- You are able to select multiple entities to view on your dashboard

Dashboard

- Each widget has symbols which allow users to:

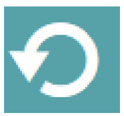


View your portfolio in greater detail



Expand widget to view full screen

Reduce widget to original size



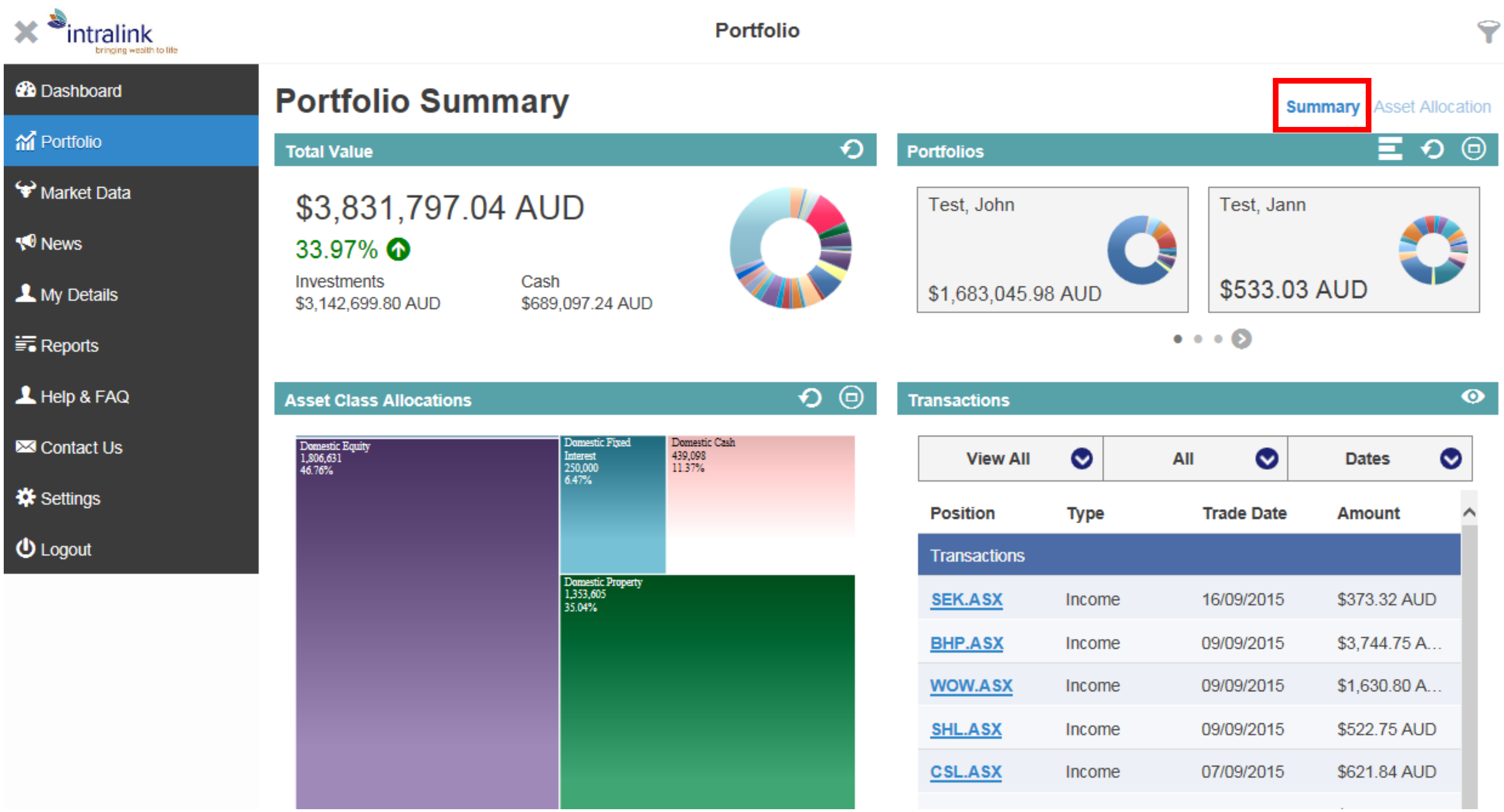
Reload data

Select which entity(s) you wish to view

Portfolio

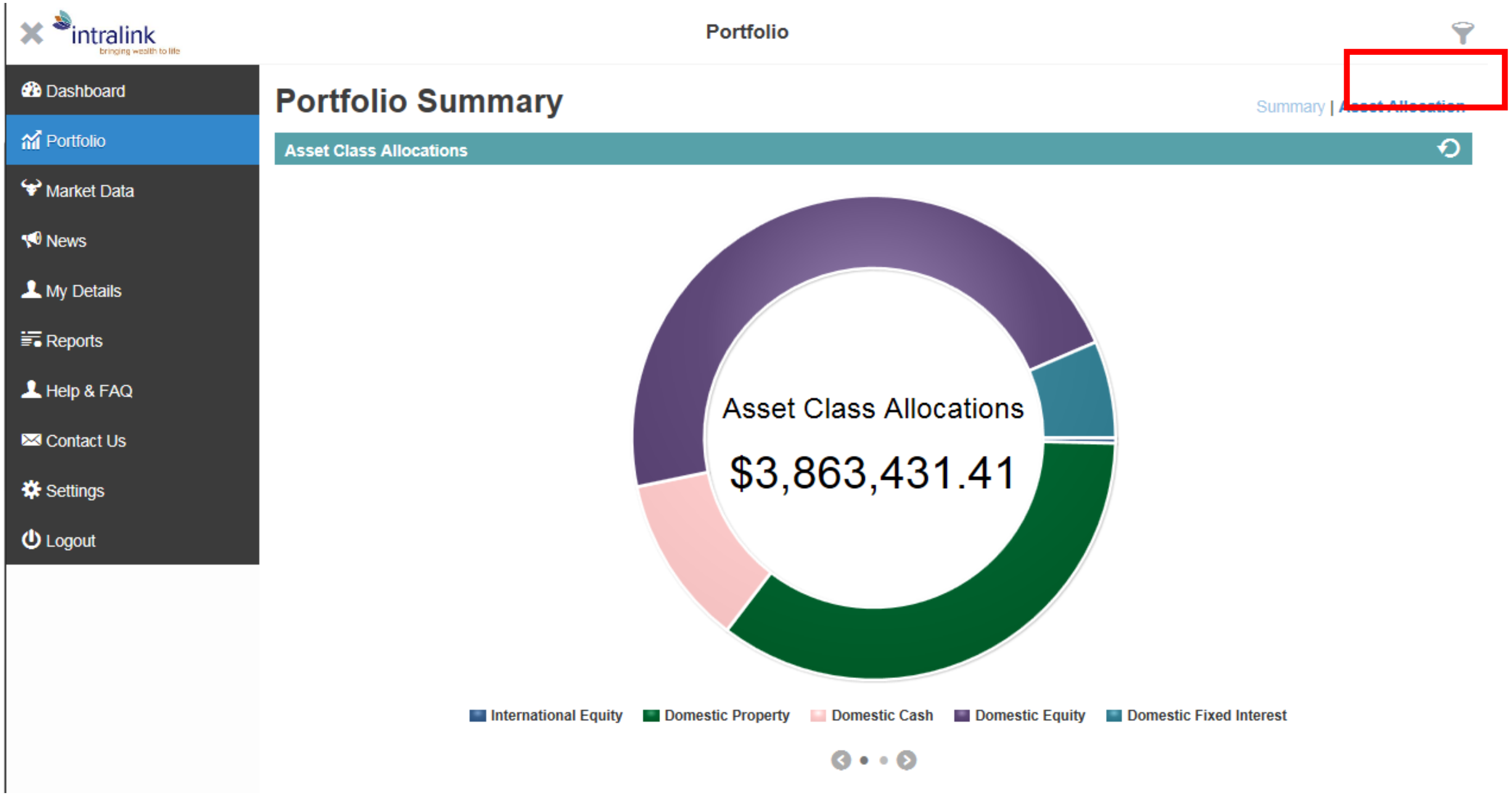
- Allows user to view portfolio in two different views:

  Summary View



Portfolio

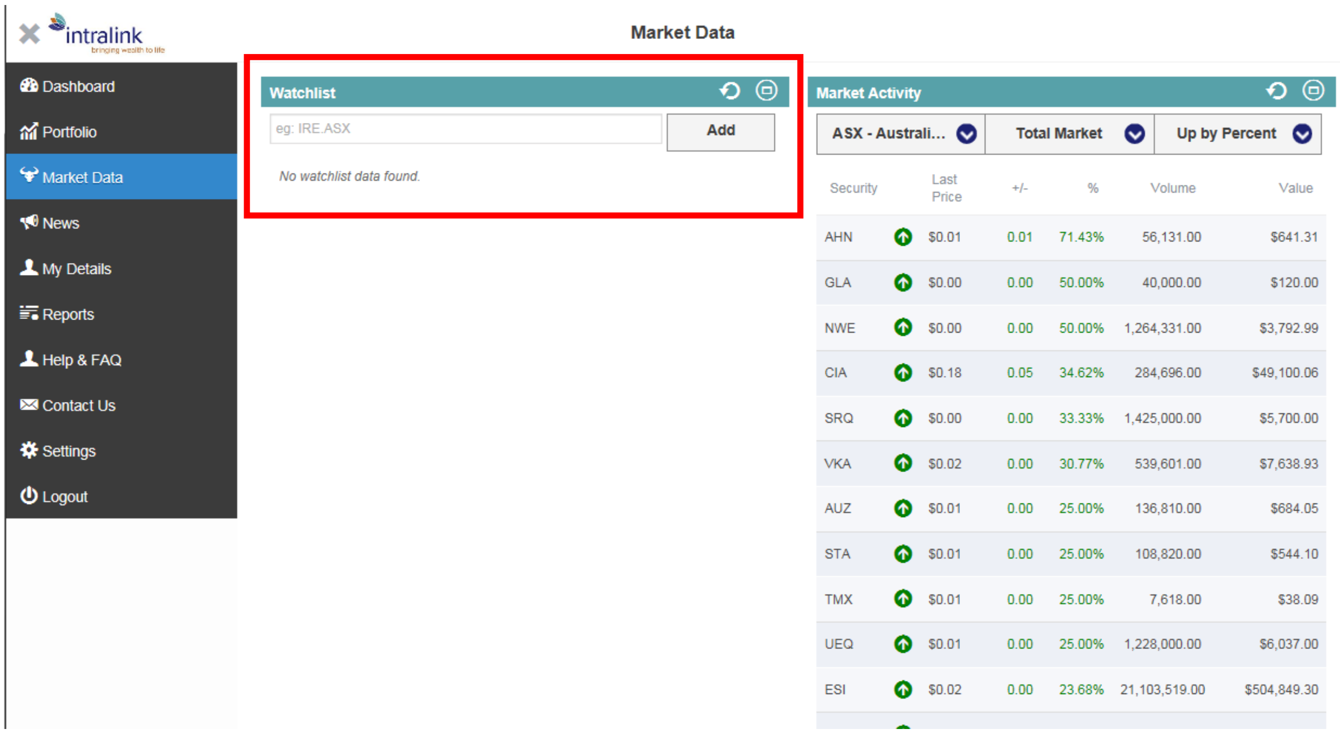
- Asset Allocation view



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

Market Data

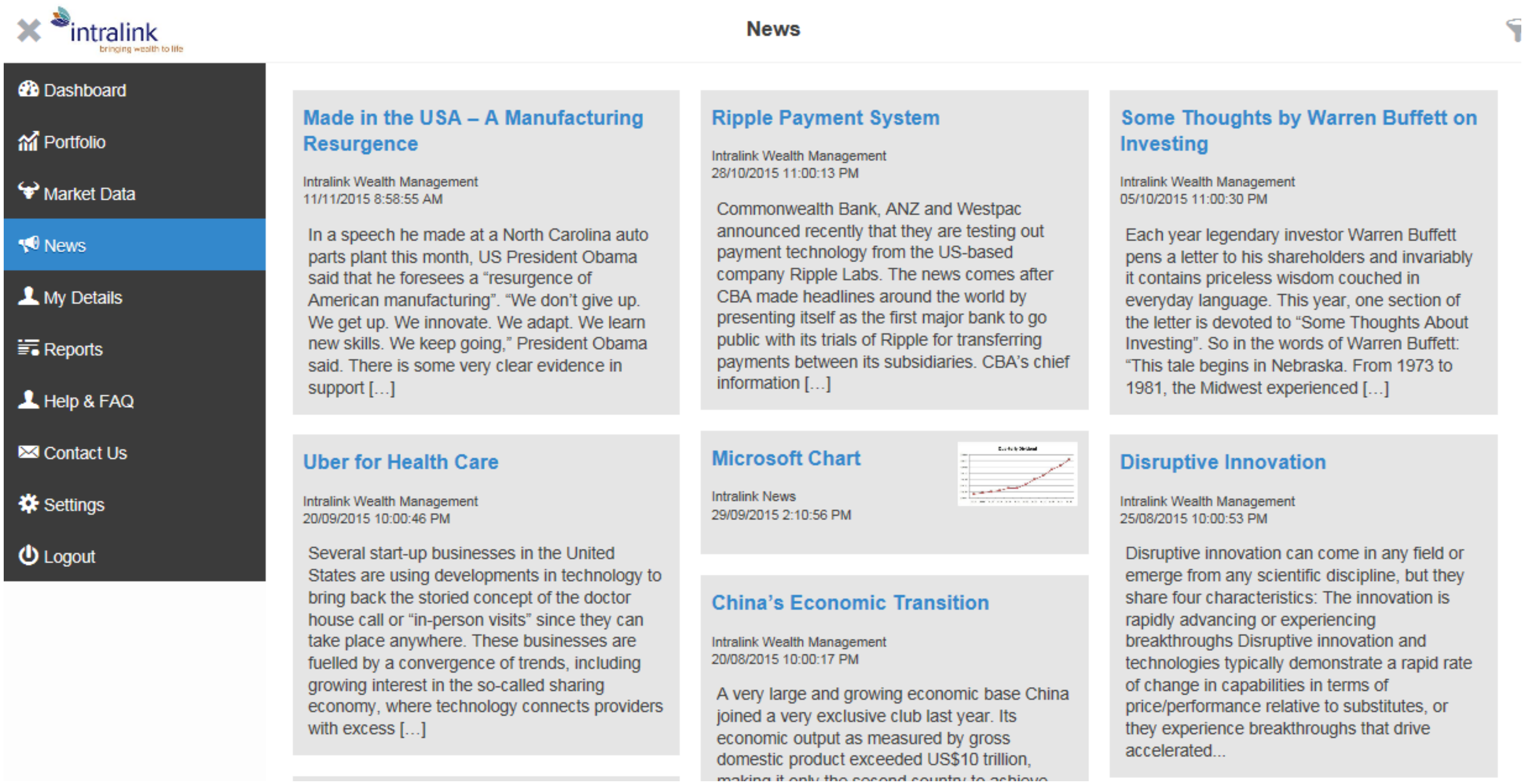
- Allows you to watch the market activity of shares on the ASX by adding them to your personal “watchlist”:
  - Type ASX code into the Code box and click on add
  - Once added, choices can be removed or updated



intralink
bringing wealth to life

News

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



intralink
bringing wealth to life

My Details

- Summary of your personal information:

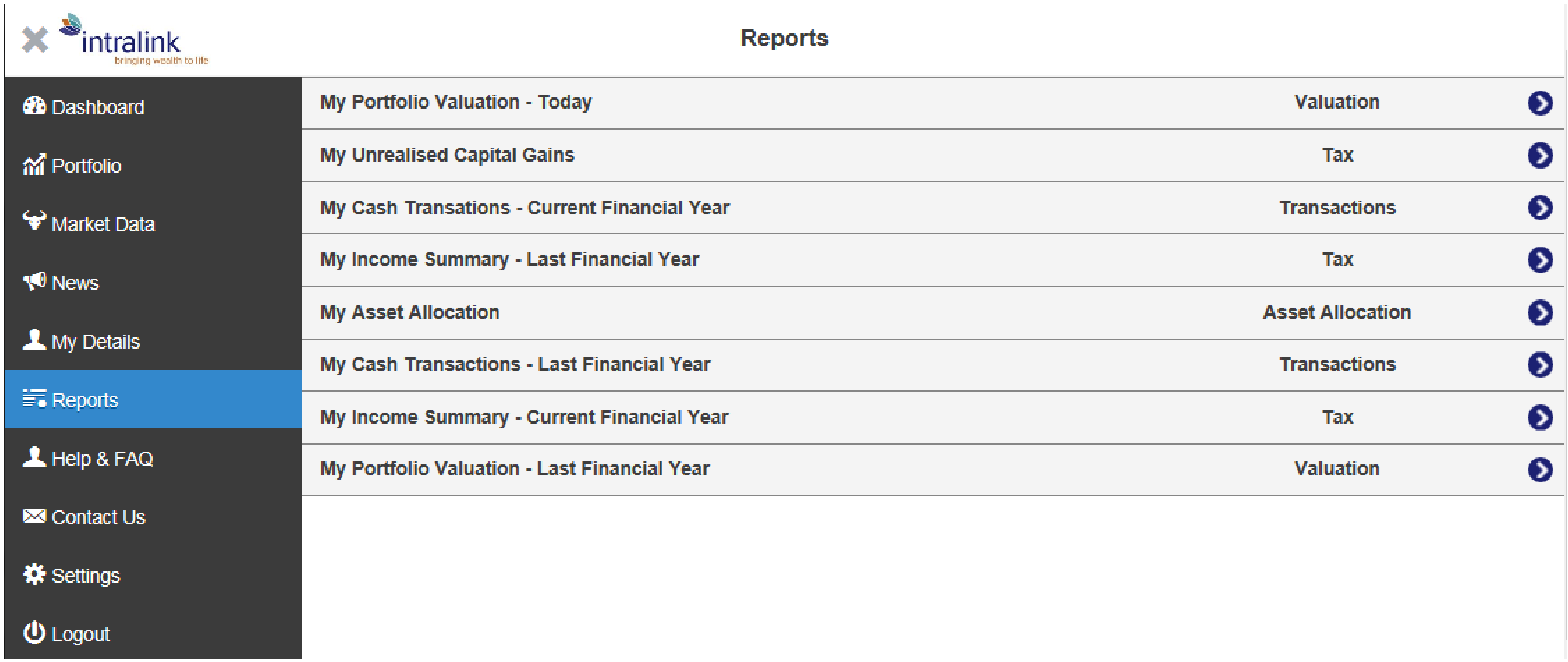
Key Details		
	Client	Partner
Title	Prof	Mrs
Surname *	Test	Test
First Name	John	Jann
Preferred Name	John	Jann
Date of Birth		
Preferred Phone		
Preferred Email		
Street	Level 14 470 Collins Street	
Suburb	MELBOURNE	MELBOURNE
State	VIC	
Postcode	3000	

- 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.

intralink
bringing wealth to life

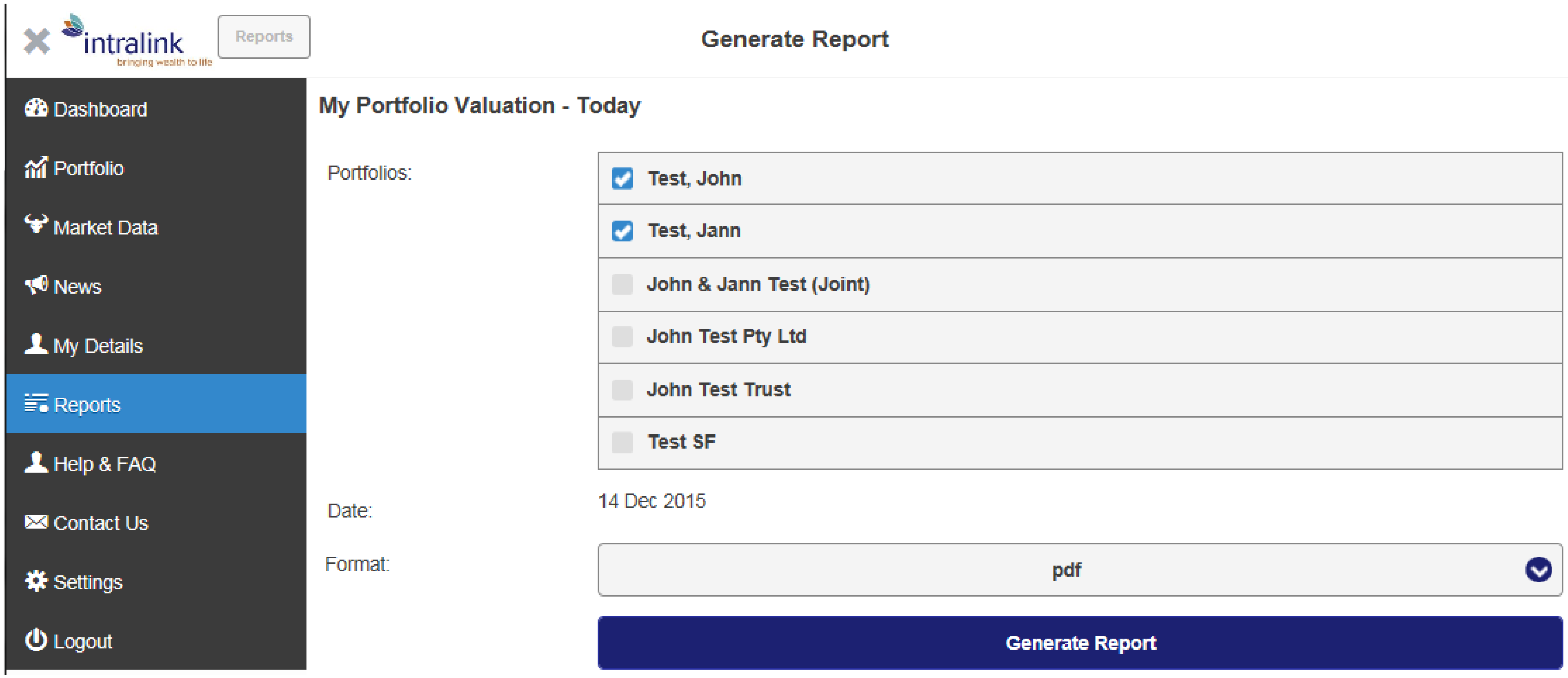
Reports

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



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)



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

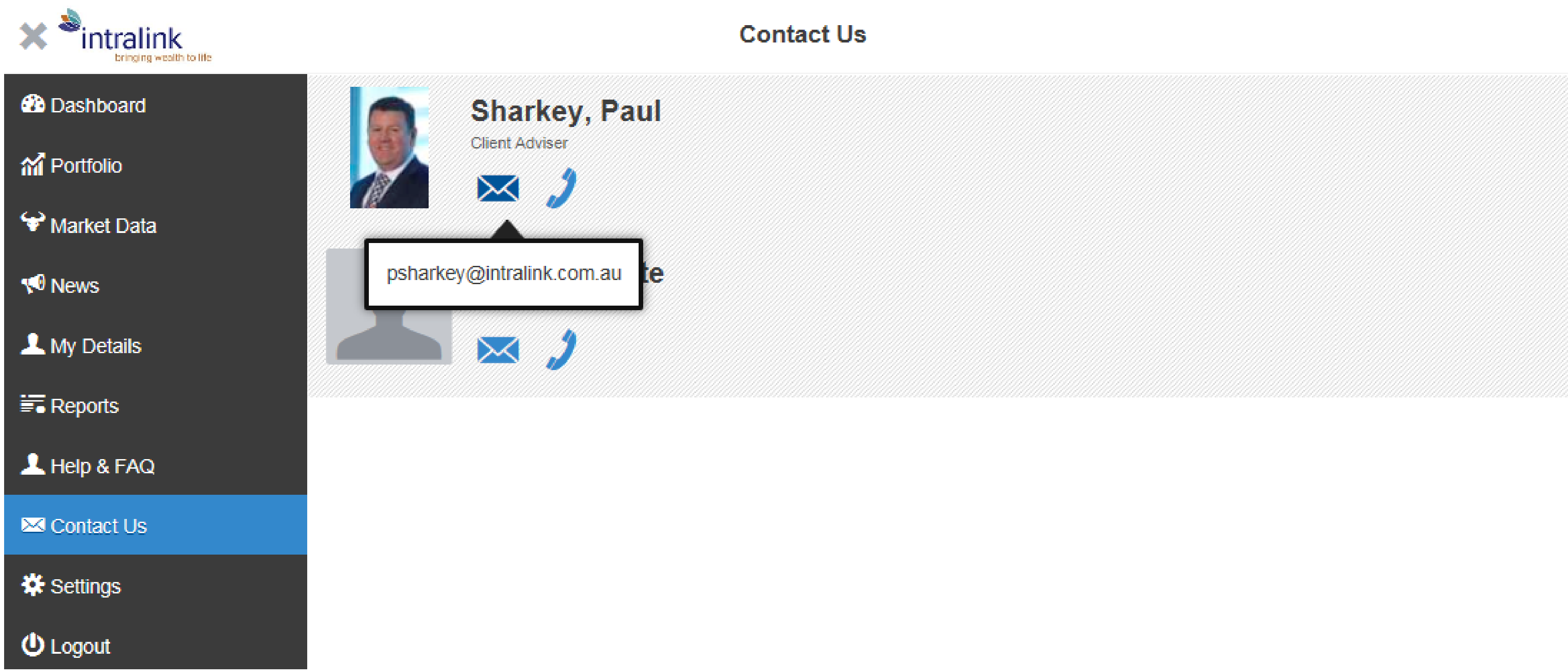
Why is there a difference between the portfolio page and the portfolio value when I run the report?

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

intralink
bringing wealth to life

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.



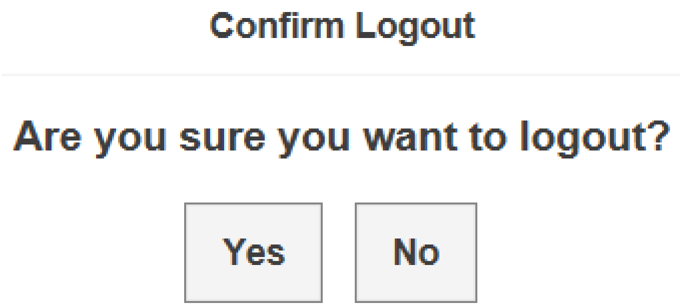
intralink
bringing wealth to life

Settings

- Here you can change your password and detailed above.

Logout

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



intralink
bringing wealth to life

Any questions

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

Intralink Wealth Management Pty Ltd

Level 14, 470 Collins Street

Melbourne Victoria 3000

T +613 9629 1100
E intralink@intralink.com.au
W www.intralink.com.au

intralink
bringing wealth to life