



HIGHTOWER

CLIENT USER GUIDE

Well-th View and the Well-th Vault

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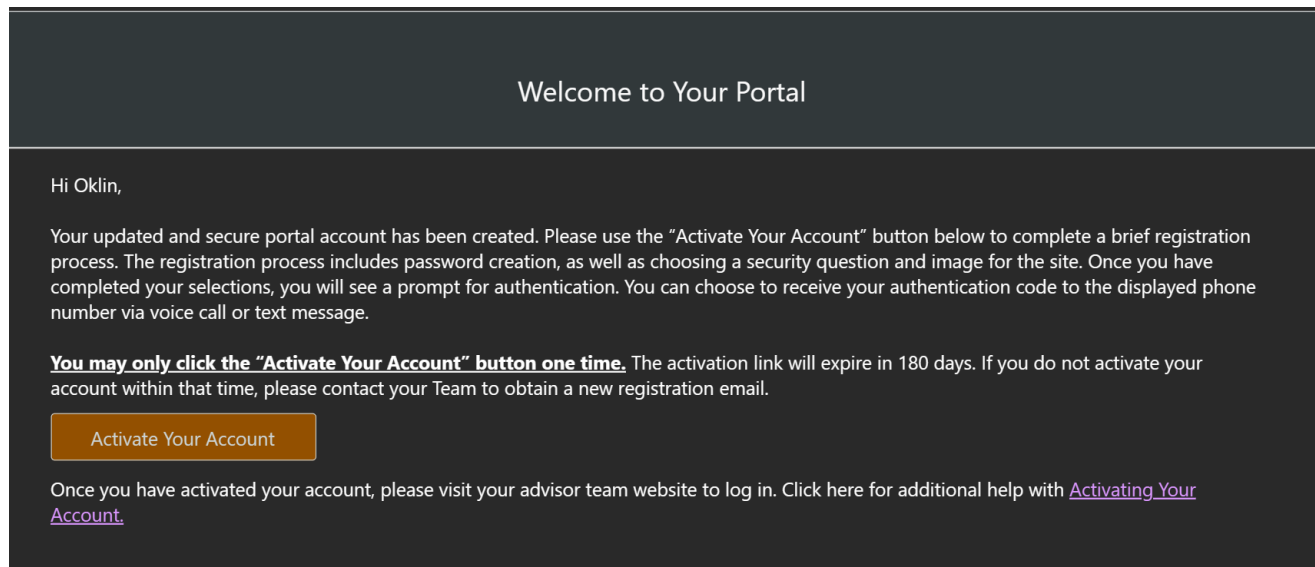
I. How to Use Well-th View and the Well-th Vault.

Well-th View allows you access to all advisor-recommended portals.

Initial Activation and registration.

When your advisor provides you with access to Well-th View, you will receive an email from Hightower Advisors. Click on the "Activate Your Account" button.

To activate your account, open the "Welcome to Your Portal" email and click on "Activate Your Account" button.



To select a password

- Click on the "Set up" box.
- Select a password and press Enter. Note that your password must meet the requirements outlined above the "Enter password" box.
- Re-enter the password you selected in the "Repeat password" box.
- Click "Next"

Set up security methods

Security methods help protect your account by ensuring only you have access.

Set up required

Password
Choose a password for your account
Used for access.

Security Question
Choose a security question and answer that will be used for signing in
Used for recovery.

[Back to sign in](#)

Set up password

Password requirements:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Does not include your first name
- Does not include your last name
- Your password cannot be any of your last 2 passwords

Enter password

Re-enter password

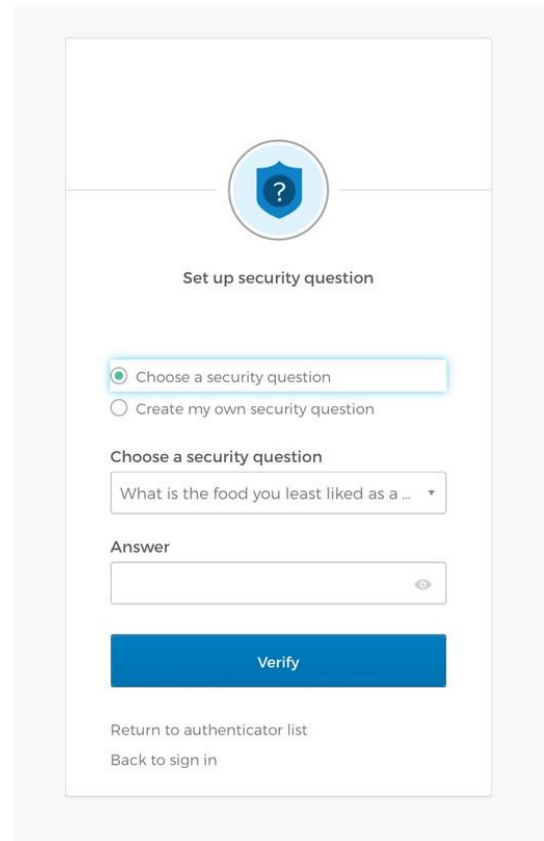
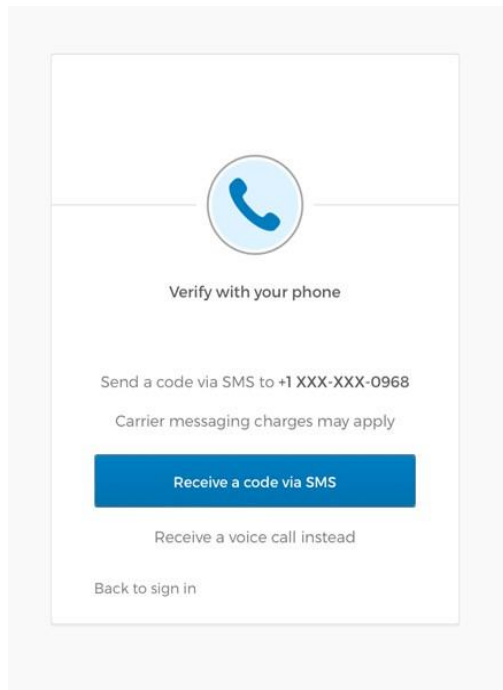
[Return to authenticator list](#)
[Back to sign in](#)

Multi-Factor Authentication

- Choose your preferred method for receiving an authentication code: either via SMS text or receive a voice call instead.

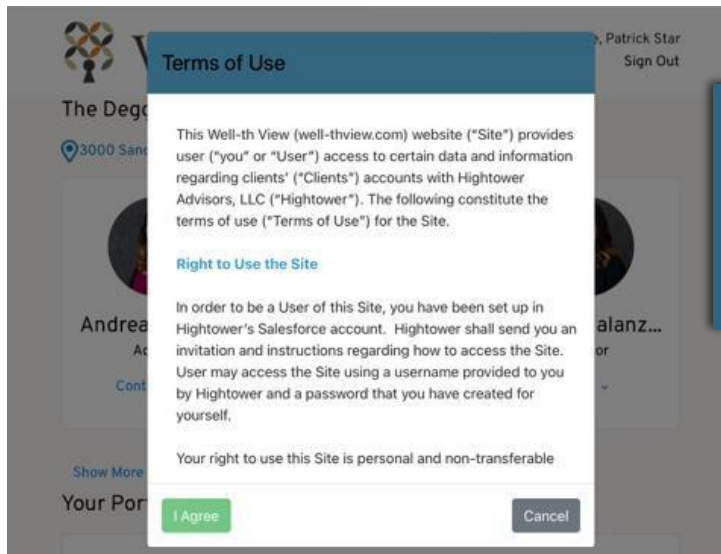
Set up your security question

- Choose whether you'd like to select a security question from the dropdown list or create your own question.
- Choose a security question from the dropdown list and enter your answer in the "Answer" box.
- Click "Verify".

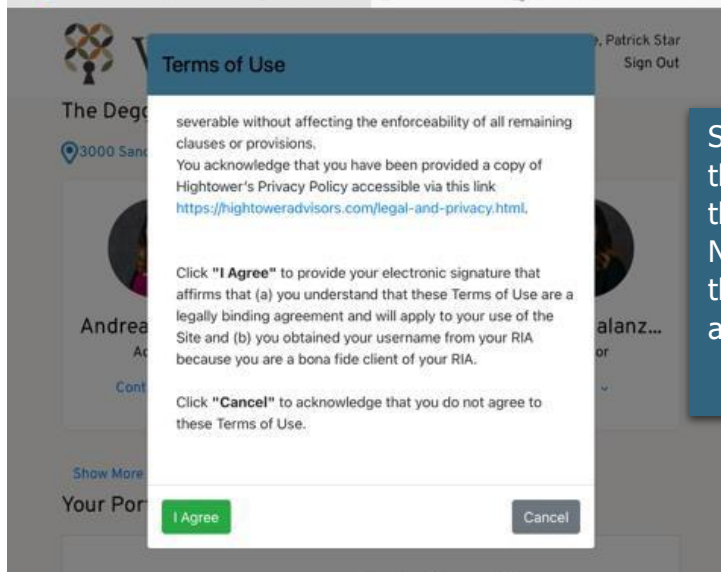


Terms of Use

On the first login attempt and periodically thereafter, you must acknowledge the “Terms of Use”.



Step 1: read the verbiage pressing the down arrow until you reach the end of the Terms of Use.



Step 2: if you agree with the Terms of Use, click on the "I Agree" button. NOTE: you may not use the portal unless you agree with these Terms.

Well-th View Homepage:

This is the homepage of Well-th View. Depending on your advisor’s configuration, you may have access to the following tiles on your Well-th View homepage.

- Click “Contact” to see information about your advisor team member or to schedule a meeting with your advisor.

The screenshot shows the Well-th View homepage. At the top, there are two advisor profiles: Michael Bankston (Advisor) and Jessica Pinto (Client Services). Below the profiles, there is a contact information section for Michael Bankston, including an email address (demo@hightoweradvisors.com) and a phone number (424-386-4870). A "Schedule" button is visible. The main content area displays a total account value of \$19,824,116.00 and a table of accounts. The table has columns for Account Name, Custodian, Value, and As of Date. The accounts listed are JoshTest6, Michael Jordan IRA, and Michael Jordan Roth, all Manual Accounts as of 10/19/2017. A "See Accounts Details" link is present.

Account Name	Custodian	Value	As of Date
JoshTest6	Manual Account	\$7,349,243.00	10/19/2017
Michael Jordan IRA	Manual Account	\$4,000,000.00	10/19/2017
Michael Jordan Roth	Manual Account	\$3,350,000.00	10/19/2017

Accounts Tile

The Accounts Tile presents a comprehensive list of your accounts, showcasing balances and custodians.

Allocations Tile

The Allocation Tile provides allocation data of your overall holdings.

See Accounts Details and See Allocation Details

Click “See Accounts Details” or “See Allocation Details” to access your Black Diamond portal.

The screenshot shows the Well-th View homepage with four main tiles. At the top, there are two advisor profiles: Michael Bankston (Advisor) and Jessica Pinto (Client Services). Below the profiles, there is a contact information section for Michael Bankston, including an email address (demo@hightoweradvisors.com) and a phone number (424-386-4870). A "Schedule" button is visible. The main content area is divided into four tiles:

- Accounts Tile:** Displays a total account value of \$19,824,116.00 and a table of accounts. The table has columns for Account Name, Custodian, Value, and As of Date. The accounts listed are JoshTest6, Michael Jordan IRA, and Michael Jordan Roth, all Manual Accounts as of 10/19/2017. A "See Accounts Details" link is present.
- Allocation Tile:** Shows a total allocation of \$19.8M. A donut chart displays the asset class breakdown:

Asset Class	Percentage	Value
Global Fixed Income	29.28%	(\$5.8M)
Equity	24.53%	(\$4.8M)
Balanced	17.1%	(\$3.3M)
Cash & Equivalents	15.69%	(\$3.1M)
To Be Classified	7.07%	(\$1.4M)

 A "See Allocation Details" link is present.
- Vault Tile:** Features a folder icon and the text "View Your Shared Files".
- Plan Tile:** Features a folder icon and the text "View Your Reports, Tax Forms, and Custodial Statements".

Well-th View and Well-th Vault User Procedures

How to Access the Well-th Vault.

The Well-th Vault allows you to:

- View and collaborate with your Advisor on documents
- Upload documents for your Advisor team
- View documents and statements
- View tax forms and statements from your custodian


NOTE: if you are using Safari on an iPad, please change the page zoom setting to 85% for the best experience (go to Settings>Safari>Page Zoom- set to 85%).

View Your Shared Files


Click on "View Your Shared Files" to view your documents and those shared by your advisor.

View Your Report, Tax Forms and Custodial Statements

Click on "View Your Report, Tax Forms and Custodial Statements" to access your quarterly reports, tax forms and custodial statements.



Michael Bankston
Advisor
[Contact](#) ▾



Jessica Pinto
Client Services
[Contact](#) ▾


Accounts

My Accounts: 10 [See Accounts Details](#)

Account Name ▾	Custodian ▾	Value ▾	As of Date ▾
JoshTest6	Manual Account	\$7,349,243.00	10/19/2017
Michael Jordan IRA	Manual Account	\$4,000,000.00	10/19/2017
Michael Jordan Roth	Manual Account	\$3,350,000.00	10/19/2017

[See more accounts](#) ▾

Allocation


 **Total \$19.8M**


Asset Class ▾

- Global Fixed Income 29.28% (\$5.8M)
- Equity 24.53% (\$4.8M)
- Balanced 17.1% (\$3.3M)
- Cash & Equivalents 15.69% (\$3.1M)
- To Be Classified 7.07% (\$1.4M)

[See Allocation Details](#)

Vault


View Your Shared Files


View Your Reports, Tax Forms,
and Custodial Statements

Plan

- Access your Accounts and Balances
- Organize your Goals and Priorities
- Track your Spending

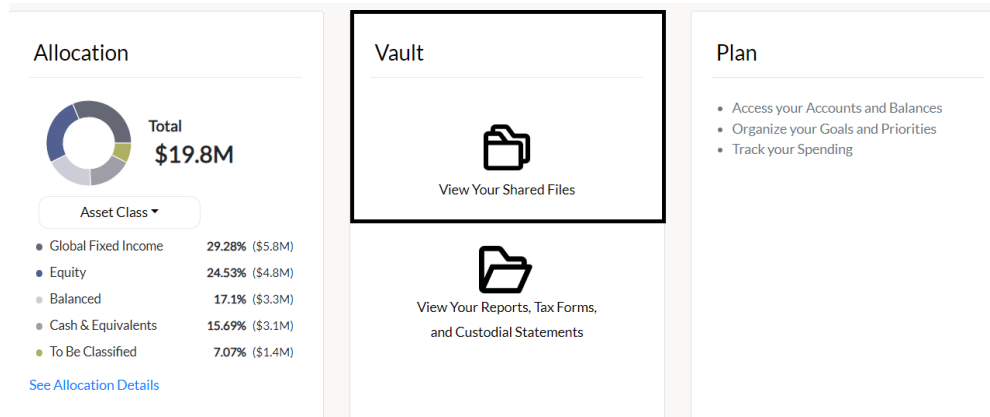
Well-th View and Well-th Vault User Procedures

There are multiple ways to access the Vault after the registration has been completed:

1. Type the URL in browser for the portal landing page: <https://well-thview.com>. Enter credentials; the Well-th View home page is displayed. Click on the Vault portal.
2. Go to your advisor's website and click on the "Access your Account" button.
3. Use the Box mobile app. If using a mobile device with the Box mobile app installed, activate the Box app and enter credentials directly.

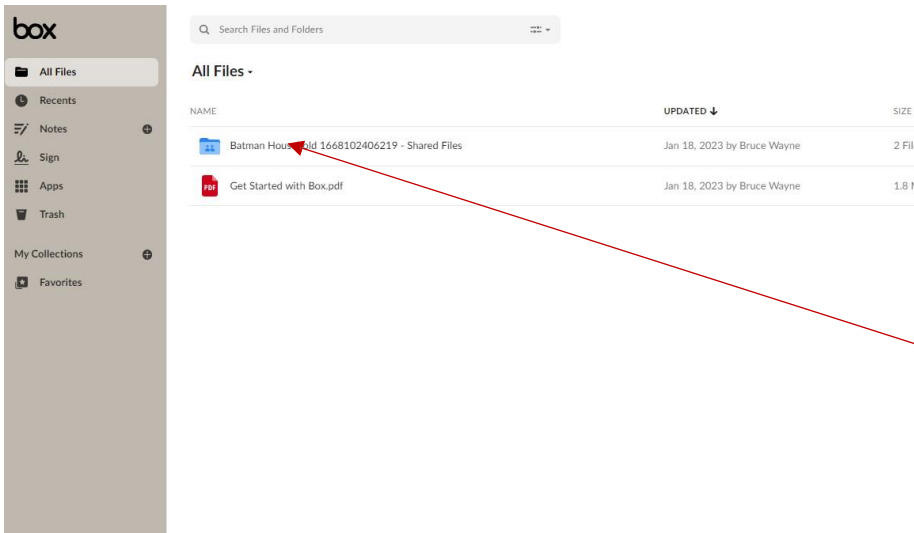
View Your Shared Files.

Click on "View Your Shared Files" to view your documents and those shared by your advisor.

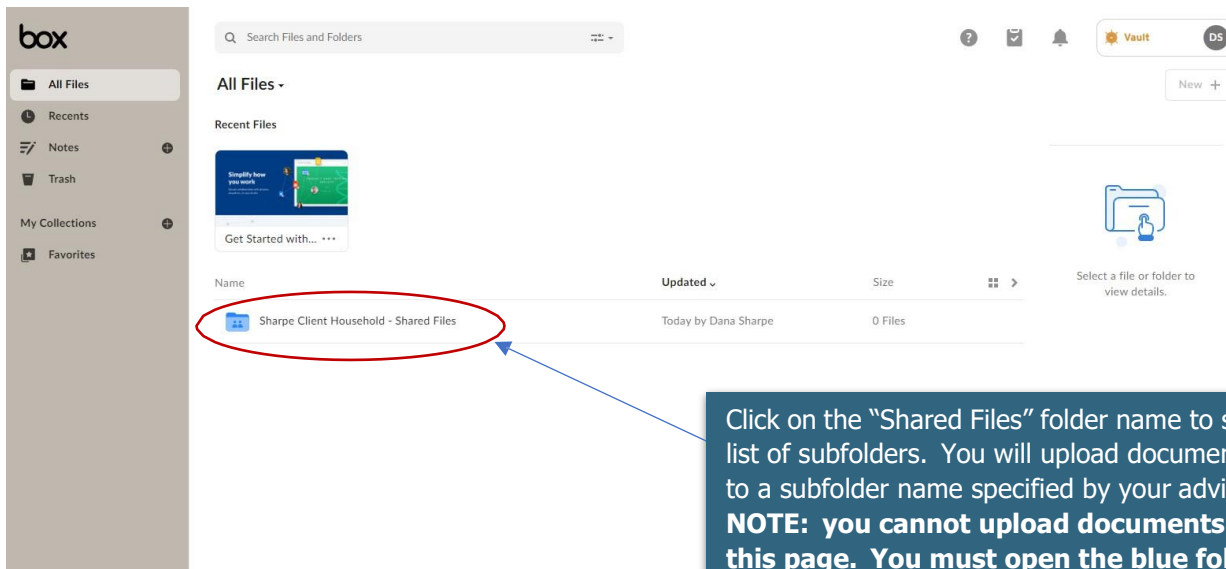


Share a document with your Advisor.

Box is the vendor we have chosen to use for secure document storage. Your home vault page should look something like this.



Click on the top blue folder to access documents shared by your Advisor.



Click on the "Shared Files" folder name to see a list of subfolders. You will upload documents to a subfolder name specified by your advisor. **NOTE: you cannot upload documents on this page. You must open the blue folder in order to upload a document for your advisor.**

Well-th View and Well-th Vault User Procedures

Search Files and Folders

All Files > Sharpe Client Household - Shared Files

Name	Updated	Size	Sharing	Details
HighTower Portal Testers - Taxes	Today by Your Advisor	0 Files	VA Vault Admin Owner	
HighTower Portal Testers - Retirement Planning	Today by Your Advisor	0 Files	DS Dana Sharpe Editor	
HighTower Portal Testers - Goals	Today by Your Advisor	0 Files	VB Vault Admin - BI Co-owner	
HighTower Portal Testers - Financial Planning	Today by Your Advisor	0 Files	VD Vault Admin - DS Co-owner	
HighTower Portal Testers - Estate Planning	Today by Your Advisor	0 Files	VE Vault Admin - EH Co-owner	

Click on the subfolder name where your advisor would like a document placed.

Search Files and Folders

All Files > Sharpe Client Household - Shared Files > HighTower Portal Testers - Taxes

click on the "New +" button to expand the menu. Then select "File Upload."

File Upload

Folder Upload

Folder

Box Note

Box Note From Template

Bookmark

Pages Document

Keynote Presentation

Numbers Spreadsheet

Get started by adding your first file

Create new documents directly within Box or upload an existing file

Upload

Well-th View and Well-th Vault User Procedures

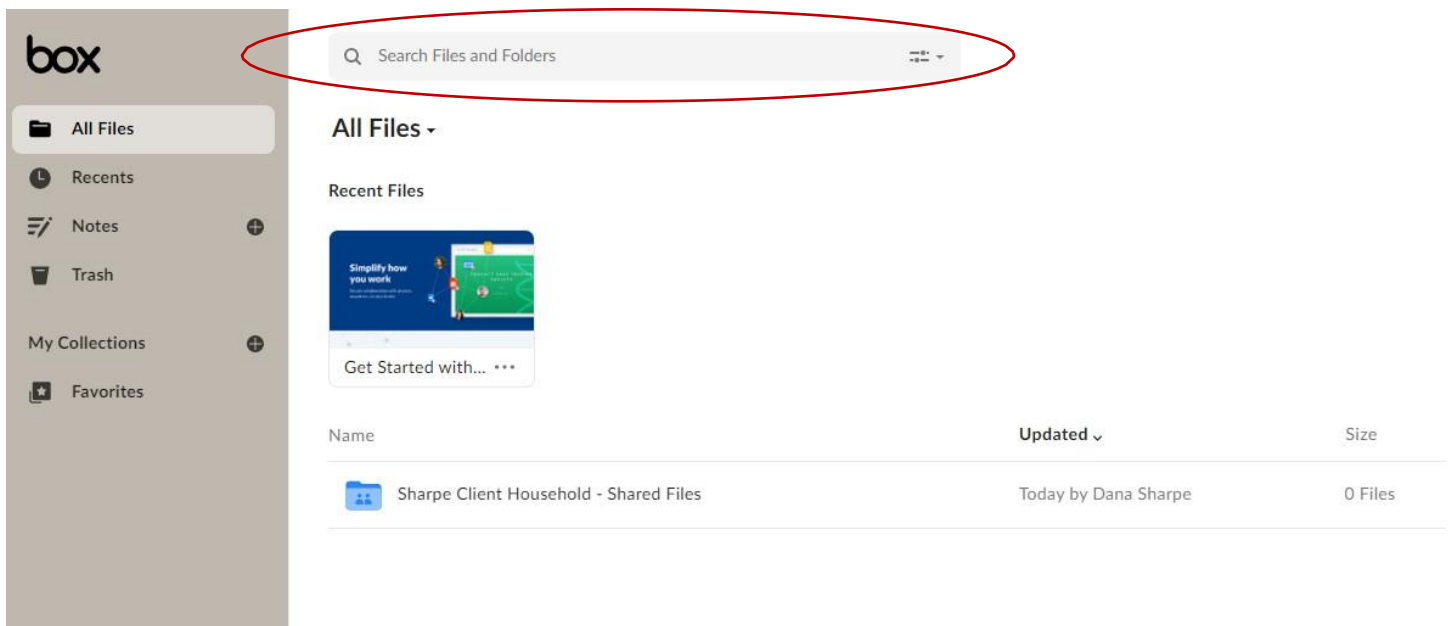
Locate and open a document shared by your Advisor.

Once your files are in the Well-th Vault it's easy to access them wherever you are. You have three slick shortcuts at your disposal: the Search tool, Jump to Folder and the Updates view.


Search

If you're looking for a certain file – or even a certain word or phrase within a file – jump right to it with the Search tool. Just enter your key word or phrase into the search bar at the top of your page.

The Well-th Vault will search the titles of your files and folders as well as the body of your documents.



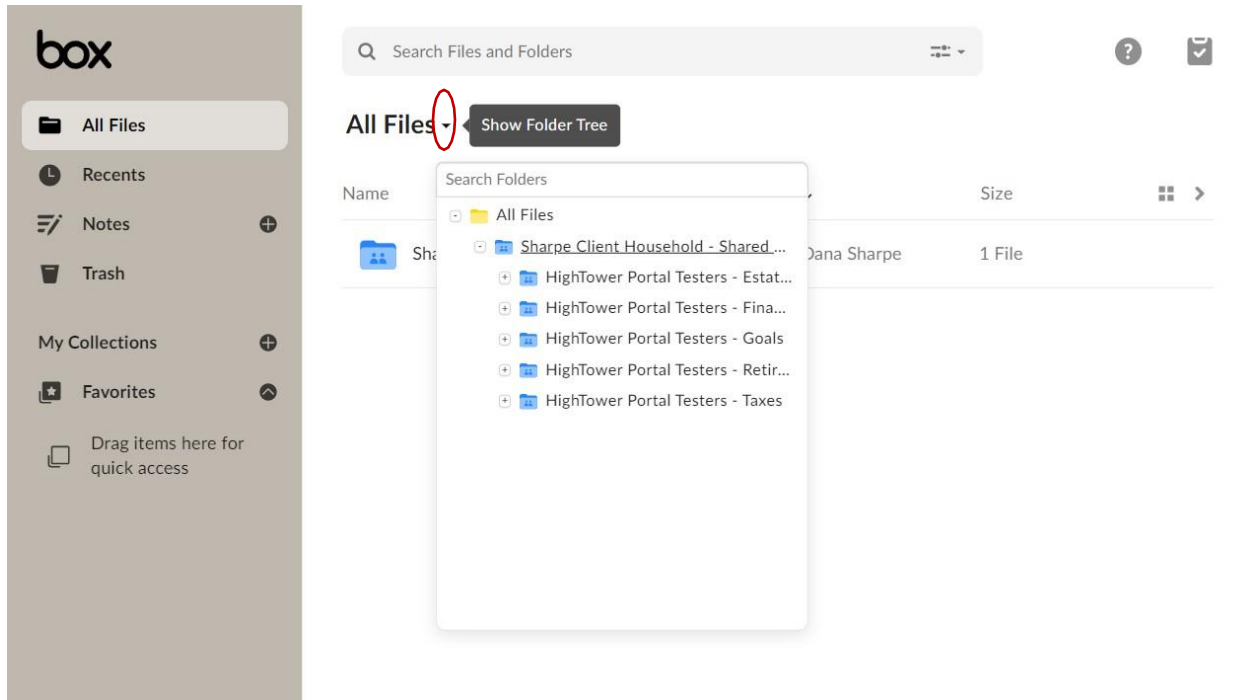
The screenshot displays the Box web interface. On the left is a navigation sidebar with the 'box' logo and menu items: All Files, Recents, Notes, Trash, My Collections, and Favorites. The main content area shows 'All Files' and 'Recent Files'. A search bar at the top right contains the text 'Search Files and Folders' and is circled in red. Below the search bar, there is a 'Recent Files' section with a card for 'Simplify how you work'. At the bottom, a table lists files and folders.

Name	Updated ↓	Size
 Sharpe Client Household - Shared Files	Today by Dana Sharpe	0 Files

Well-th View and Well-th Vault User Procedures

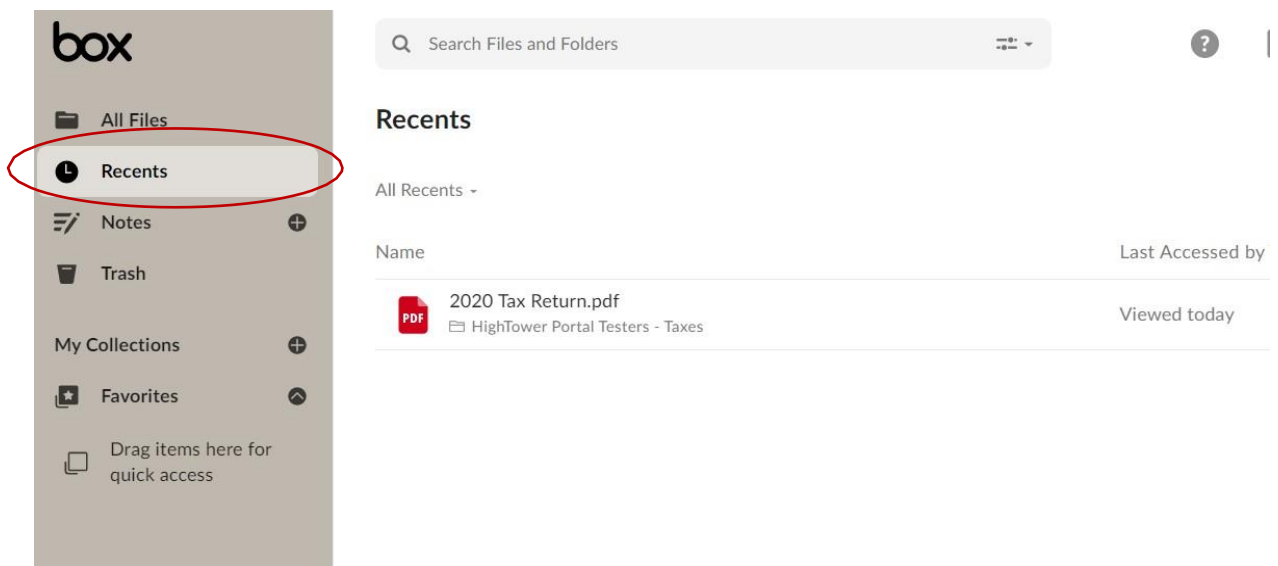
Folder Tree

If you want to get to a folder quickly, use the Folder Tree tool. Simply click the down arrow next to All Files and select "Show Folder Tree" to see your entire folder structure. Click on the desired subfolder to be taken directly there.



Recents

On this page, you'll see what files and folder have been recently updated in your vault account. To view recent updates, click "Recents" in the left side bar.



Download a file shared by your Advisor.

To Download a Single File:

The screenshot shows the Box web interface. On the left is a sidebar with navigation options like 'All Files', 'Recents', 'Notes', 'Trash', and 'My Collections'. The main area displays a file named '2020 Tax Return.pdf' with a red arrow pointing to its name. Above the file, an action toolbar is visible, with the download icon (a downward arrow) circled in red. A blue callout box with white text provides instructions: 'Click next to a file's name to select it. The action toolbar will appear above your files in the top-right. Click the download icon to begin the download process'.

To Download Multiple Items:

- Shift+click on multiple items to select them. The action toolbar will appear above your files in the top-right.
- Click **Download** to begin the download process. Your selected items will be downloaded together in a single zip file.

Well-th View and Well-th Vault User Procedures

Add comments or annotations to files.

Comments provide a powerful way to drive discussion around content in your Vault account. Use comments to request feedback from your Advisor, make notes to yourself, notify your Advisor of updates to a file, and a variety of other social interactions.

You can view comments in the Preview page of a file within the sidebar to the right or post your own in the "Write a comment" box at the bottom. Your Advisor can reply directly to a comment or add their own comments.

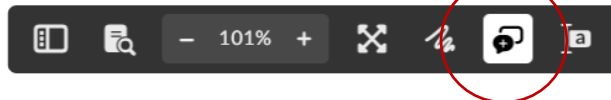
Communicating with your Advisor:

v1 2020 Tax Return.pdf
HighTower Portal Testers - Taxes · Updated Today by Dana Sharpe

This is a test document.

Draw a box to comment

Step 1. Select the comment icon and then click and hold your left mouse button to draw a comment box.



Well-th View and Well-th Vault User Procedures

v1 2020 Tax Return.pdf
HighTower Portal Testers - Taxes · Updated Today by Dana Sharpe

This is a test document.

Step 2: Enter comments in box. Start the comment with the "@" symbol followed by your Advisor's email address and they will receive notification that you have commented.

Step 3: Click the "Post" button.

@ Bob@Hightower Demo - please take a look at this and let me know your thoughts.

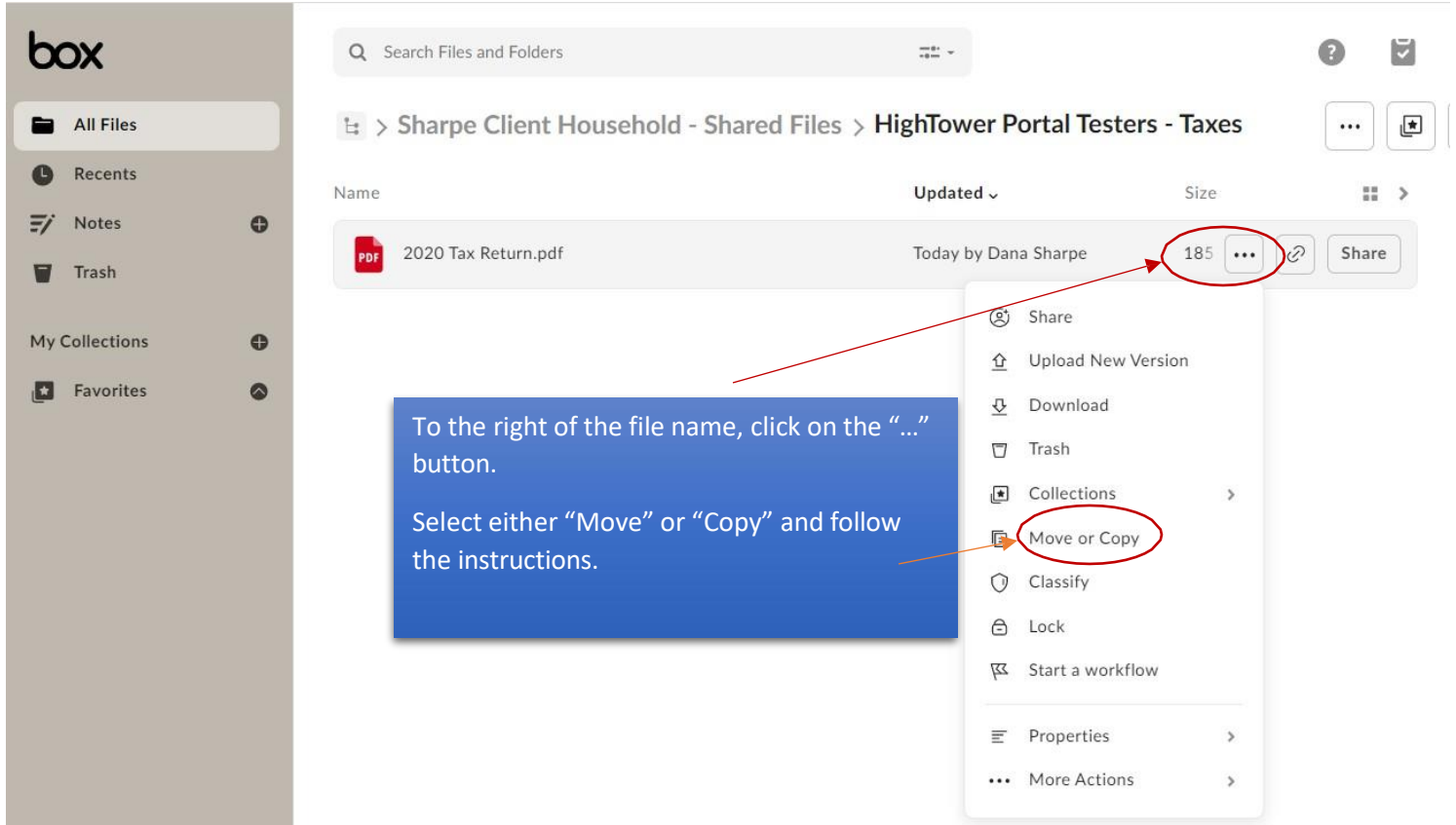
Cancel Post

101%

This message also remains with the file or folder on which you've commented. This gives context for others coming to work with this information.

Well-th View and Well-th Vault User Procedures

Move or copy files from folder to folder.
Locate the file you wish to move or copy.



The screenshot shows the Box web interface. On the left is a sidebar with navigation options: All Files, Recents, Notes, Trash, My Collections, and Favorites. The main area shows a search bar and a breadcrumb path: > Sharpe Client Household - Shared Files > HighTower Portal Testers - Taxes. Below this is a table of files with columns for Name, Updated, and Size. A file named '2020 Tax Return.pdf' is selected, showing it was updated 'Today by Dana Sharpe' and is 185 KB. A context menu is open over the file, listing actions such as Share, Upload New Version, Download, Trash, Collections, Move or Copy (highlighted with a red circle), Classify, Lock, Start a workflow, Properties, and More Actions. A blue callout box with white text says: 'To the right of the file name, click on the "..." button. Select either "Move" or "Copy" and follow the instructions.'

Add subfolders as desired.

- Click New, and from the menu that displays click New Folder. The Create a New Folder dialog box displays.
- Enter the folder name.
- Advisors will automatically have access to any folders added.


Email Notifications

To keep you apprised of current events in your account, we've built an email notification system that lets you know when your Advisors accesses your content or edits your files. You will receive an email when your Advisor shares files with you too.

View Your Reports, Tax Forms and Custodial Statements

Click on "View Your Report, Tax Forms and Custodial Statements" to access your quarterly reports, tax forms and custodial statements.

Allocation




Total
\$19.8M


Asset Class ▾

- Global Fixed Income 29.28% (\$5.8M)
- Equity 24.53% (\$4.8M)
- Balanced 17.1% (\$3.3M)
- Cash & Equivalents 15.69% (\$3.1M)
- To Be Classified 7.07% (\$1.4M)

[See Allocation Details](#)

Vault


 View Your Shared Files


 View Your Reports, Tax Forms,
and Custodial Statements

Plan

- Access your Accounts and Balances
- Organize your Goals and Priorities
- Track your Spending

To access your Black Diamond reports and statements, simply click on the dropdown menu. From there, you can choose to view them directly on your screen or download them to your device.

Vault
Home

📁 Portfolio Reports and Statements (3)
▾

📁 Tax Forms (6)
▾

📁 Custodial Statements (844)
▾

To view your reports directly on your screen, click on the eye icon. Alternatively, click on the down arrow To save the report on your device. Find the desired report, and list may be filtered by selecting a year And/or quarter.

Vault
Back

📁 Portfolio Reports and Statements (3)
⌵

Year All ▾ Quarter All ▾

Name	Portfolio	Start Date	End Date	Page Count	Date Posted	
📄 Quarterly Performance Report	Q1TestHT	10-19-2017	10-19-2017	11	02-22-2024	<div style="border: 2px solid black; padding: 2px; display: inline-block;"> 👁 ↓ </div>
📄 Quarterly Performance Report	Q1TestHT	10-19-2017	10-19-2017	11	01-19-2024	<div style="border: 2px solid black; padding: 2px; display: inline-block;"> 👁 ↓ </div>
📄 Executive Summary: Performance	Q1TestHT	10-19-2017	10-19-2017	3	01-19-2024	<div style="border: 2px solid black; padding: 2px; display: inline-block;"> 👁 ↓ </div>

< 1 >

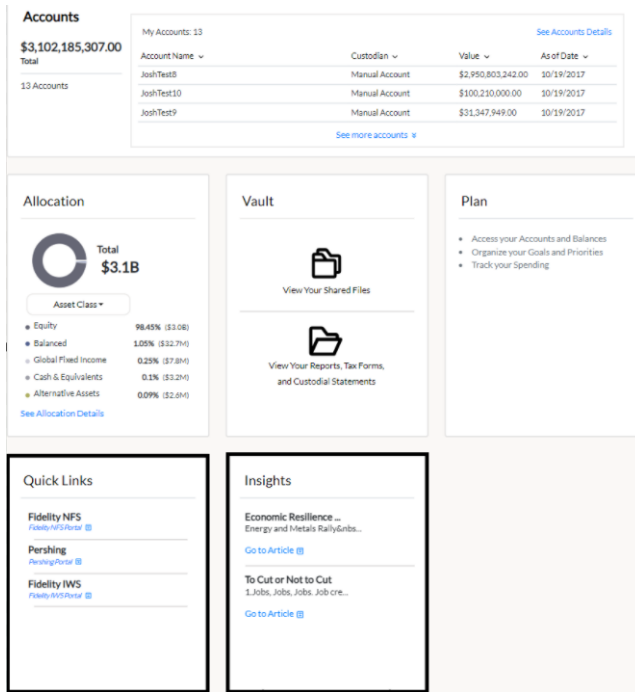
Quick Links

The quick links tile entitles shortcuts or navigational aids that provide you access to custodial links such as Fidelity, Schwab, and Pershing.

- Select the available shortcut to access various services quickly.

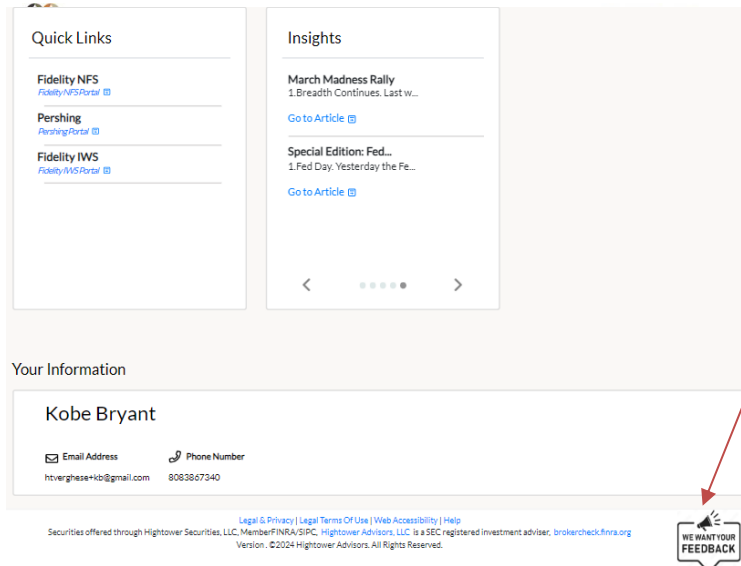
Insights Tile

The Insights feature allows you to view articles shared or authored by us. Click "Go to Article" to read the desired piece.

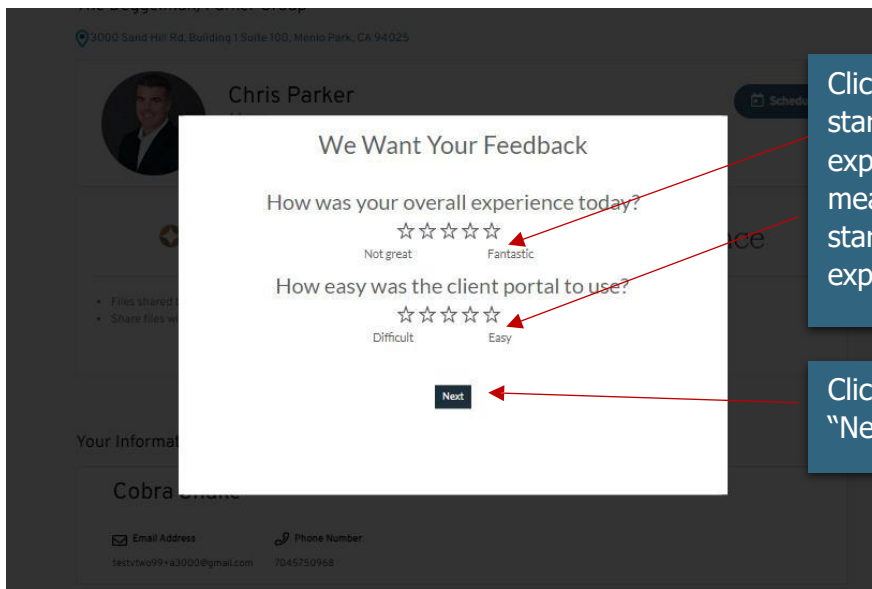


Provide Feedback on the Well-th View or Well-th Vault Portals.

We value your opinion and would like to hear about your experience with Well-th View. A feature that allows you to rate your experience has been added.



Click on "We Want Your Feedback."



Click on the number of stars to rate your experience (one star means not so good, five stars means fantastic experience).

Click on the "Next" button.

Invoice Payments

If you have chosen to receive an invoice for any advisory fees from your advisor, you will see a link on the Well-th View Home page that allows you to pay your invoice online. Note: Pay Invoice is not applicable.

The screenshot displays the Well-th View user interface. At the top left is the Well-th View logo. At the top right, it says "Welcome, Jim Griffin" and "Sign Out". A dark blue navigation bar contains a "Pay Invoice" button, which is highlighted by a red arrow and a callout box. Below the navigation bar, the user's name "Hightower Great Lakes" and address "15 N Franklin Street Suite 100, Valparaiso, IN 46383" are shown. Two advisors are listed: Michael Bankston (Advisor) and Jessica Pinto (Client Services). The "Accounts" section shows a total value of \$19,824,116.00 and a table of 10 accounts. The "Your Information" section shows the user's name "Jim Griffin" and contact details: Address (660 W Wayman #408, Chicago, Illinois, 60661), Email Address (jimgriffin@me.com), and Phone Number (18184272972). At the bottom, there are links for "Legal & Privacy", "Legal Terms Of Use", "Web Accessibility", and "Help". A "WE WANT YOUR FEEDBACK" icon is also present.

Well-th View

Welcome, Jim Griffin
Sign Out

Pay Invoice

Hightower Great Lakes

15 N Franklin Street Suite 100, Valparaiso, IN 46383

Michael Bankston
Advisor
Contact

Jessica Pinto
Client Services
Contact

Accounts
\$19,824,116.00
Total
10 Accounts

My Accounts: 10 [See Accounts Details](#)

Account Name	Custodian	Value	As of Date
JoshTest6	Manual Account	\$7,349,243.00	10/19/2017
Michael Jordan IRA	Manual Account	\$4,000,000.00	10/19/2017
Michael Jordan Roth	Manual Account	\$3,350,000.00	10/19/2017

[See more accounts](#)

Show More

Your Information

Jim Griffin

Address 660 W Wayman #408, Chicago, Illinois, 60661

Email Address jimgriffin@me.com

Phone Number 18184272972

[Legal & Privacy](#) | [Legal Terms Of Use](#) | [Web Accessibility](#) | [Help](#)

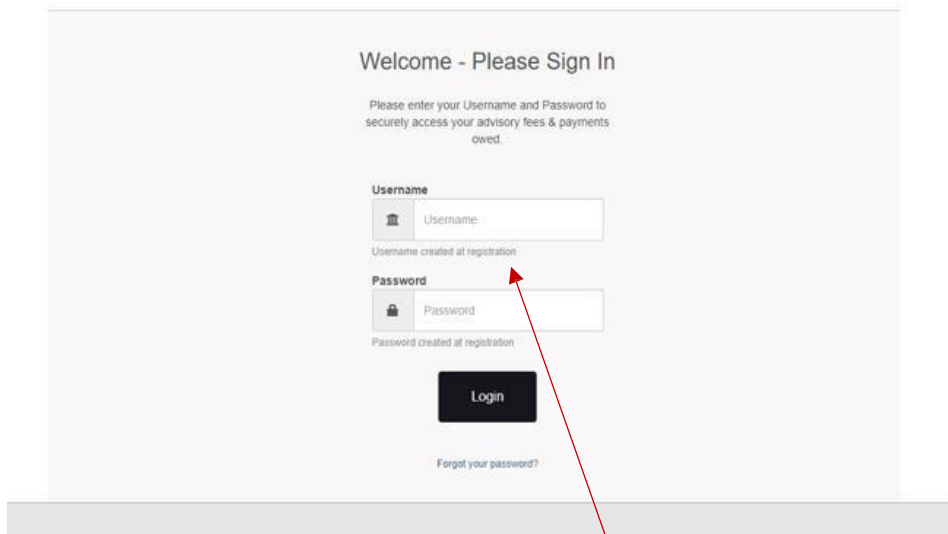
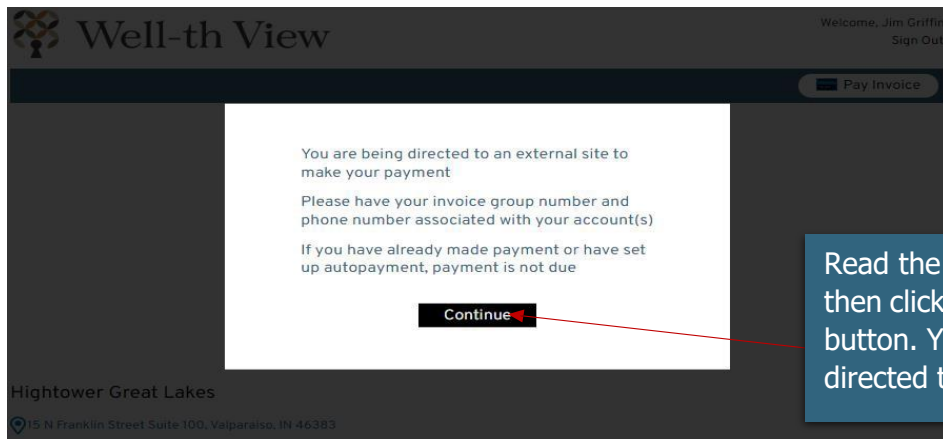
Securities offered through Hightower Securities, LLC. Member FINRA/SIPC. Hightower Advisors, LLC is a SEC registered investment adviser. [brokercheck.finra.org](#)

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WE WANT YOUR FEEDBACK

Click the "Pay Invoice" button.

Well-th View and Well-th Vault User Procedures



Enter your username and password to pay your advisory fees and any payments owed.

Securities offered through Hightower Securities, LLC memberFINRA/ SIPC. Hightower Advisors, LLC is a SEC registered investment advisor.