



# Atlas

PRIVATE WEALTH MANAGEMENT



Welcome to the  
Atlas Client Experience Portal

# Dear Client,

In our ongoing effort to enhance the quality of service to our clients, we are pleased to introduce the [Atlas Client Experience Portal](#).

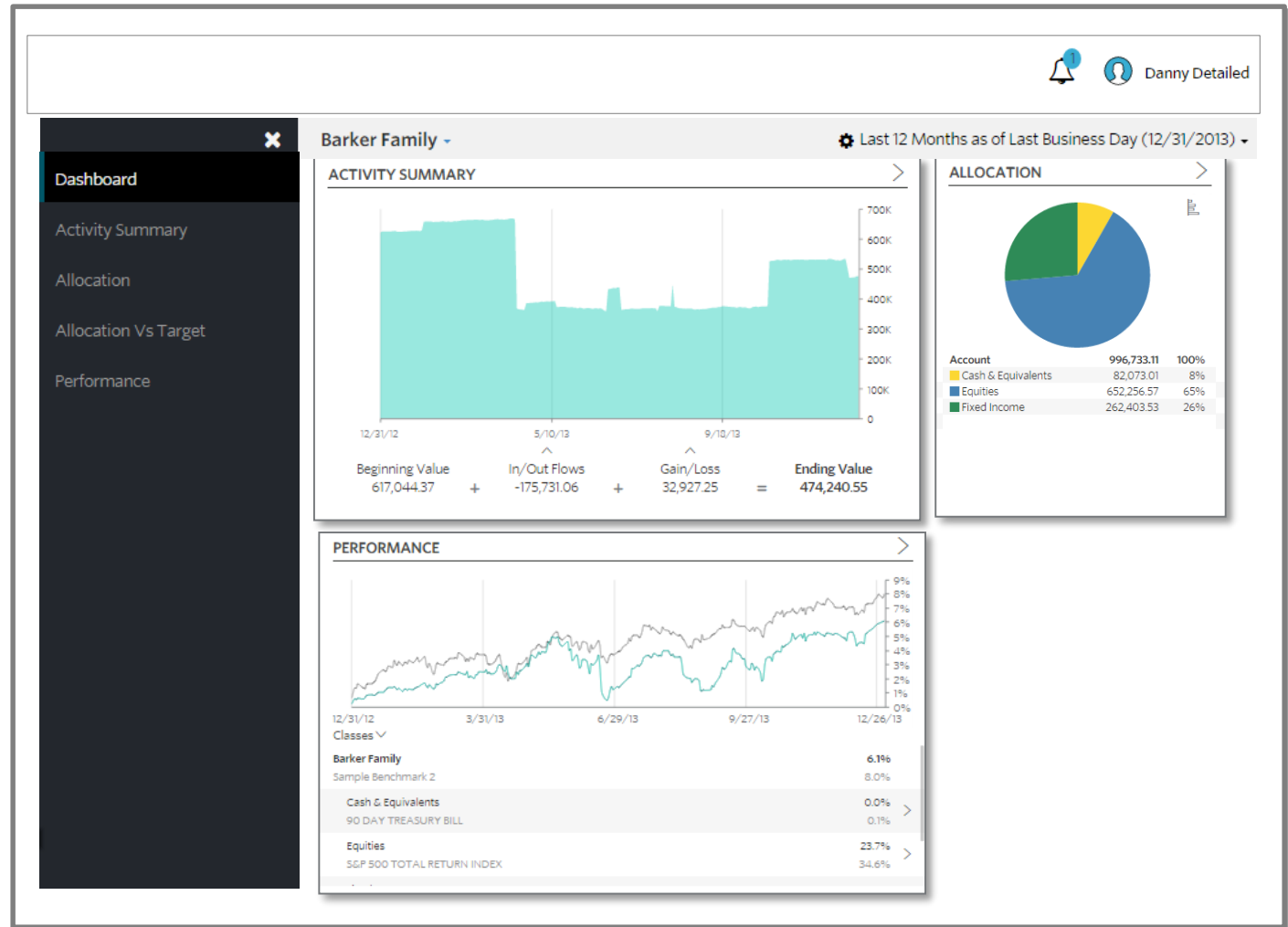
This easy-to-use online portal connects you to your financial wealth picture anytime and anywhere. Whether you want a high level overview or an in-depth look at your investments, the new investor experience makes it easier than ever.

Key features and benefits of Client Experience include the following:

- 24/7 access
- Alerts and notifications
- Compatible with most devices
- Paperless and eco-friendly
- Document storage and sharing

# Navigate the Client Experience

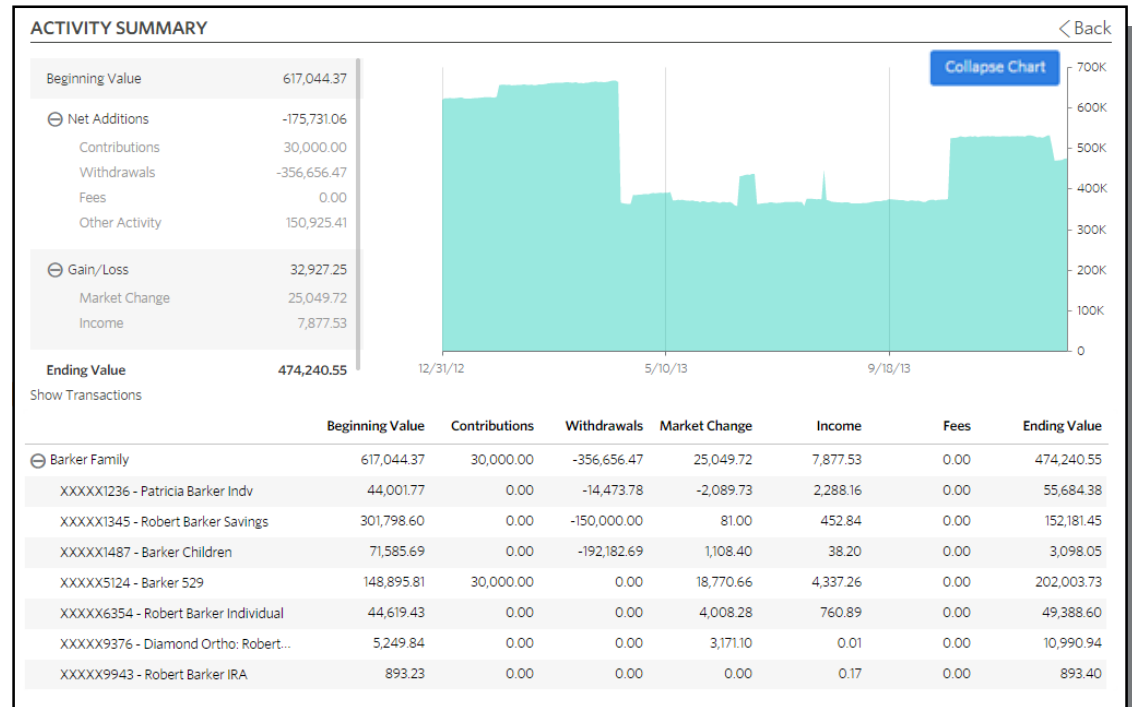
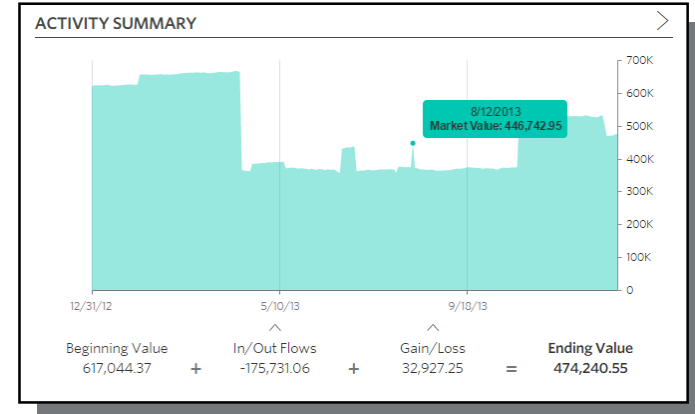
- View your entire household or switch to a single account
- Click to collapse the menu
- Edit the active date range
- View notifications from your advisor
- Update your account settings
- Select any card from the menu to open it in full-page view
- Detailed examples of available cards are shown on pages 4 – 12



# Activity Summary

## View activity and changes in your portfolio or account balance

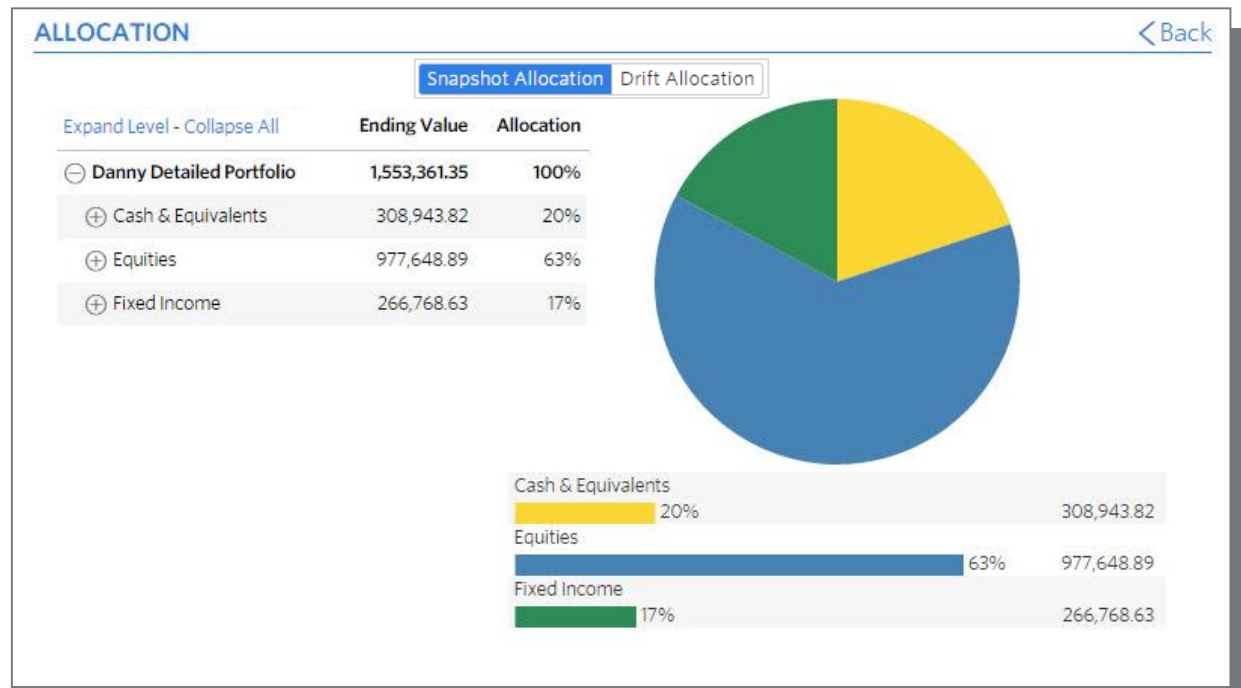
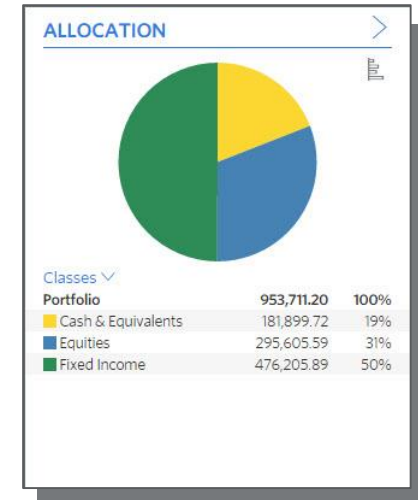
- Hover to view the market value for a specific date
- View breakout of additions and withdrawals
- See income and performance breakouts
- Toggle to view either account summary detail or transactions



# Allocation

## View the allocation breakdown of your portfolio

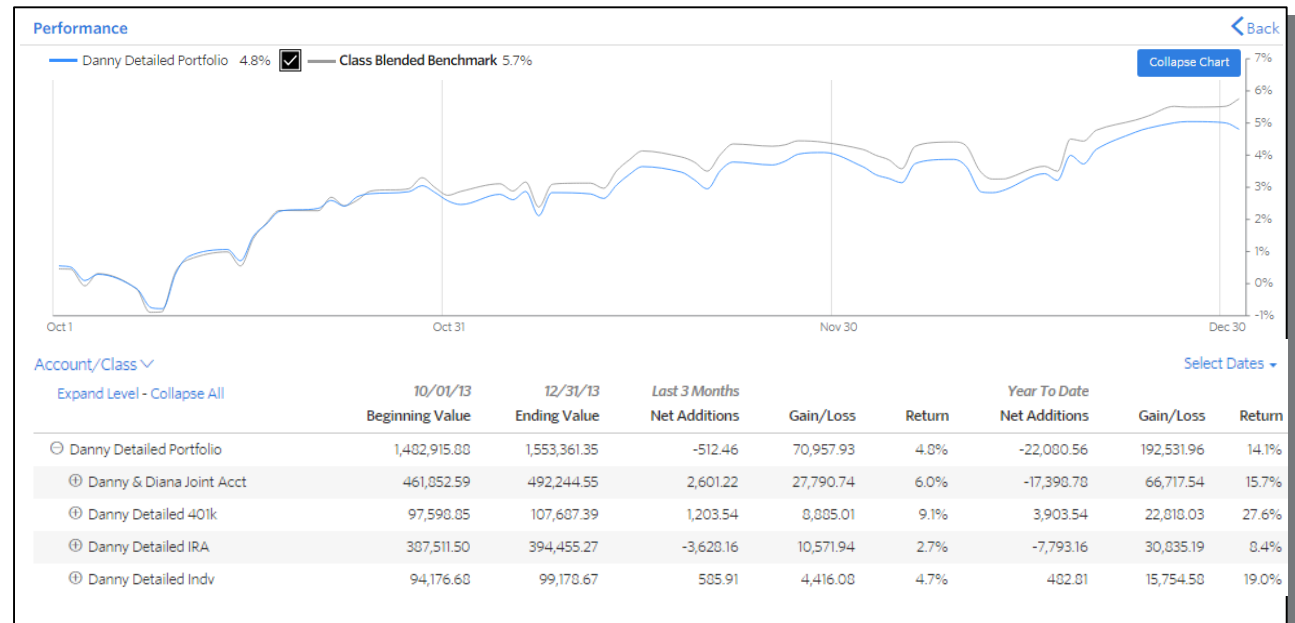
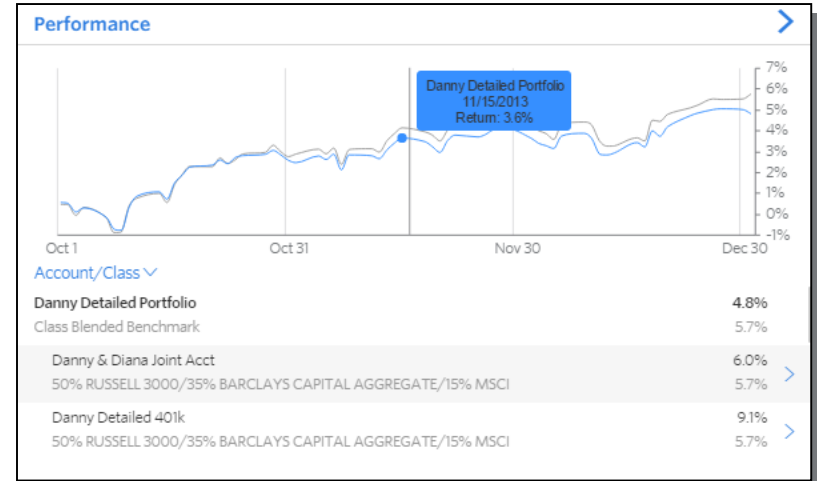
- Toggle to view a pie chart or bar chart
- Select desired allocation level
- View Snapshot or select Drift Allocation to view allocation over a period of time
- Data dynamically reflects the level selected



# Performance

## View investment performance across your portfolio

- Hover to view returns through a specific date
- Select available date ranges for display (when enabled in your Client Profile)
- Expand and collapse the grouped sections



# Transactions

## View and filter the most recent transactions in your portfolio

(consolidated view)

- Filter by transaction type (available filters are determined by your advisor)
- Export table data to an Excel spreadsheet
- Select individual transactions to view additional detail

Date	Action - Symbol	Amount
12/31/13	Dividend Reinvestment - FDRXX	0.01
12/31/13	Dividend - FDRXX	0.01
12/31/13	Dividend Reinvestment - FDAXX	0.14
12/31/13	Dividend - FDAXX	0.14
12/31/13	Dividend Reinvestment - FDAXX	1.29
12/31/13	Dividend - FDAXX	1.29

**TRANSACTIONS**

Check All

Buy
  Capital Gains

Contributions
  Expenses

Income
  Other

Reinvestments
  Sells

Withdrawals

Date	Account	Type	Asset Name	Action	Price	Amount
12/31/13	Barker 529	Dividend Reinvestment	PRIME FUND DAILY MONEY CLASS	Dividend Reinvestment	1.0	0.1
12/31/13	Barker 529	Dividend	PRIME FUND DAILY MONEY CLASS	Dividend	--	0.1
12/31/13	Barker Children	Dividend Reinvestment	FIDELITY CASH RESERVES	Dividend Reinvestment	1.0	0.4
12/31/13	Barker Children	Dividend	FIDELITY CASH RESERVES	Dividend	--	0.4
12/30/13	Barker Children	Cash Deposit	CASH	Cash Deposit	1.0	3,097.7
12/30/13	Barker Children	Buy	FIDELITY CASH RESERVES	Buy Money Market	1.0	3,097.7
12/23/13	Barker Children	Sale	FIDELITY CASH RESERVES	Sale	1.0	30,244.2

**Transactions**

[View All Transactions](#)

**Return Date:** 12/30/2013

**Account Number:**

**Account Name:** Barker Children

**Asset Name:** CASH

**Symbol:** CASH

**Type:** Cash Deposit

**Action:** Cash Deposit

**Units:** 3,097.7

**Price:** 1.0

**Amount:** 3,097.7

**Custodian:** National Financial

**Custodial Description:**

**Notes:**

(expanded view)





# Documents

## Store personal documents and access files shared by your advisor

- Upload documents to your advisor in an easy and secure manner
- Documents will only be seen by you and your advisory team
- Create folders to organize documents
- View documents and reports in one place

DOCUMENTS >

Folders Reports + File



	Type	File Size	Updated
 Sample Tax Document.docx	File	12 KB	03/26/15
 Sample Tax Document.docx	File	12 KB	04/01/15
 Tax docs.docx	File	12 KB	03/20/15
 Taxes.docx	File	12 KB	03/20/15

(consolidated view)

DOCUMENTS < Back

Folders Reports + File + Folder

< 2013

	Start Date	End Date	File Size
 Performance Report: Executive Summary	12/21/2008	12/30/2013	239 KB
 Quarterly Performance Report	12/21/2008	12/30/2013	852 KB

(expanded view)





If you would like personal assistance in navigating the portal,  
please feel free to contact your Atlas Advisor any time.

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