Mobile App Overview

Welcome to your mobile financial portal! The mobile app includes your account summaries, financial plans, allocations , documents, and advisor communication in one consolidated experience. This experience empowers you to understand your whole financial picture wherever you are and stay connected on the go.

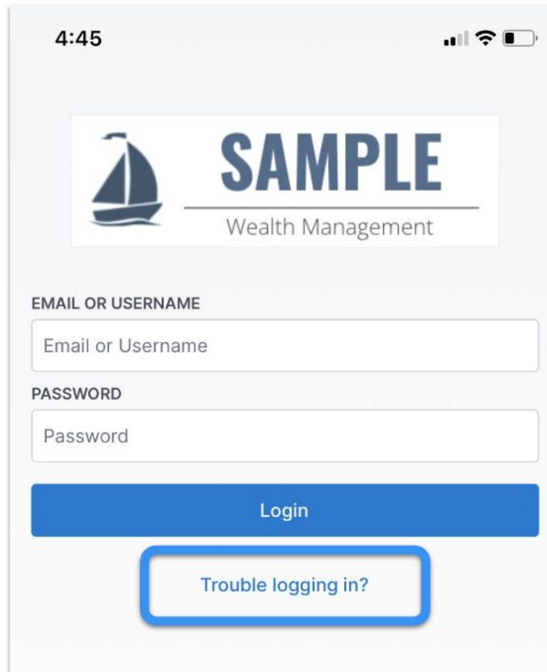
This guide walks through the features in the mobile app and provides tips on how to get the most out of the experience.

Accessing Your Account

Download the mobile app from the Apple or Android app store, **the app is called MJP Wealth.** Once complete, the mobile app will be accessible on your mobile device.

To login, enter your username > enter your password > click Login. These are the same credentials you use when logging in on a desktop or browser.

Two-Factor Authentication (2FA) is mandatory when logging into the client portal. Review the **Two/Multi-Factor Authentication Overview** for more information and additional instructions.

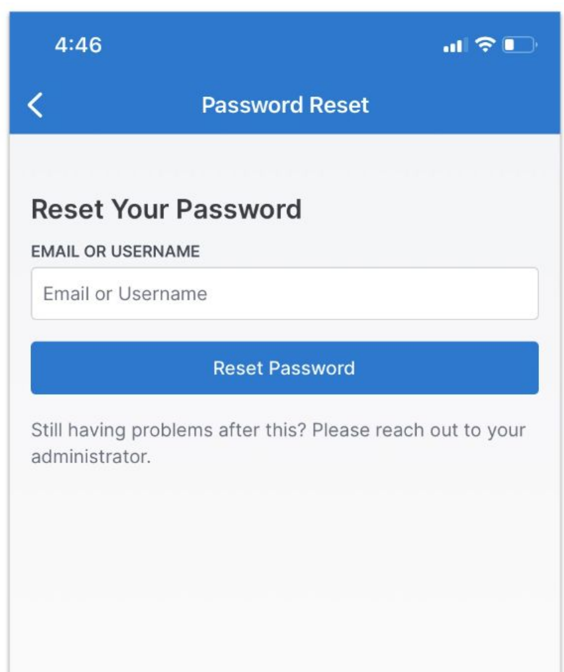


Reset Your Password

On the login page, select **Trouble logging in?** to reset your password. On the next prompt, enter your username and click **Reset Password**. An email is sent to the email address that is associated with your household.

Then, follow the instructions in the email to reset your password and access the mobile app. When creating a new password, ensure that your password meets the following criteria:

- An uppercase and lowercase letter
- A number or special character
- 10 or more characters
- Does not contain a year; for example: 1970, 2023, etc.

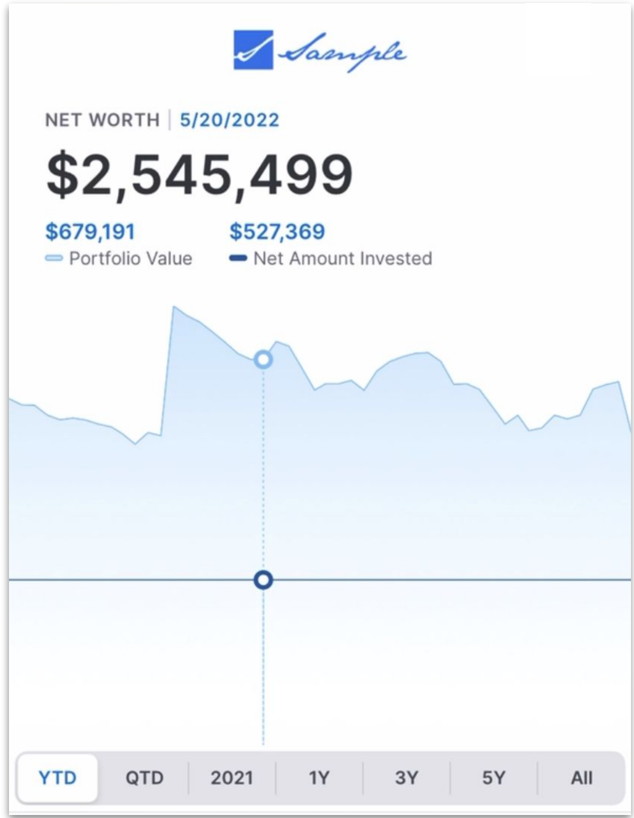


Overview Tab

Overview Tab
The Overview Tab is the landing page for the mobile app; use the interactive graph to view your Portfolio Value and Net Amount Invested.

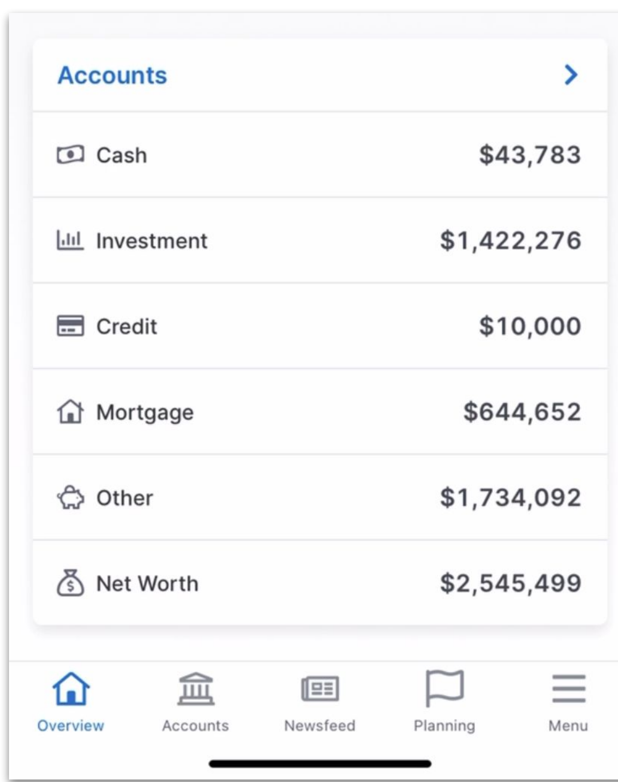
Slide your finger across the graph to view data for a specific date.

Use the built-in date range buttons to apply a select time period.



Accounts Summary
At the bottom of the Overview Tab, review the Accounts summary for the total value of each portfolio category including Cash, Investment, Credit, Net Worth, and more.

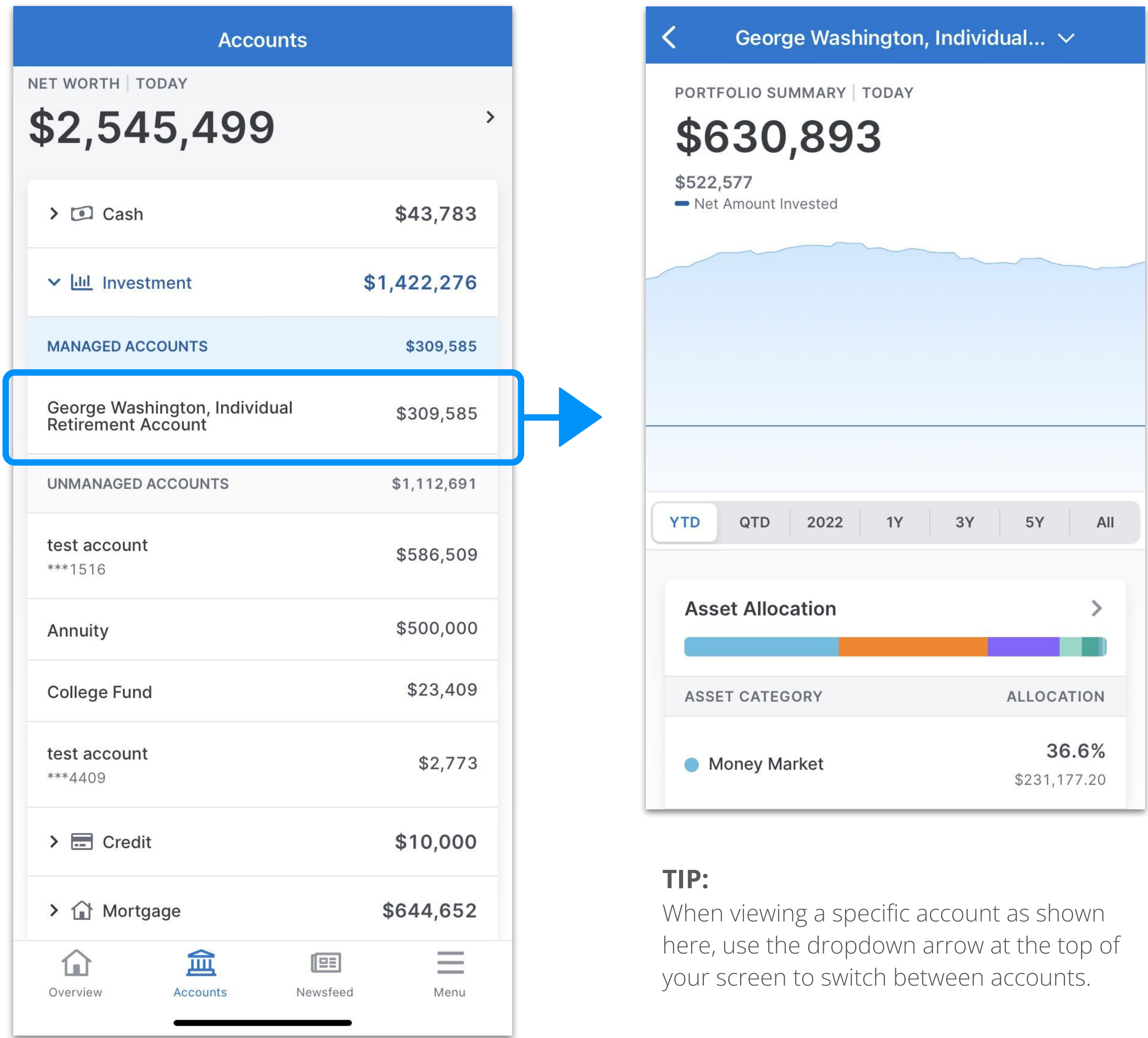
Select any of these categories to view more information on the Accounts Tab.



Accounts Tab

Accounts Tab

Review your portfolio in greater detail using the Accounts Tab. Expand the portfolio categories to see the accounts inside; select any Managed Account to view its portfolio summary, asset allocation, position information, and transaction summary.

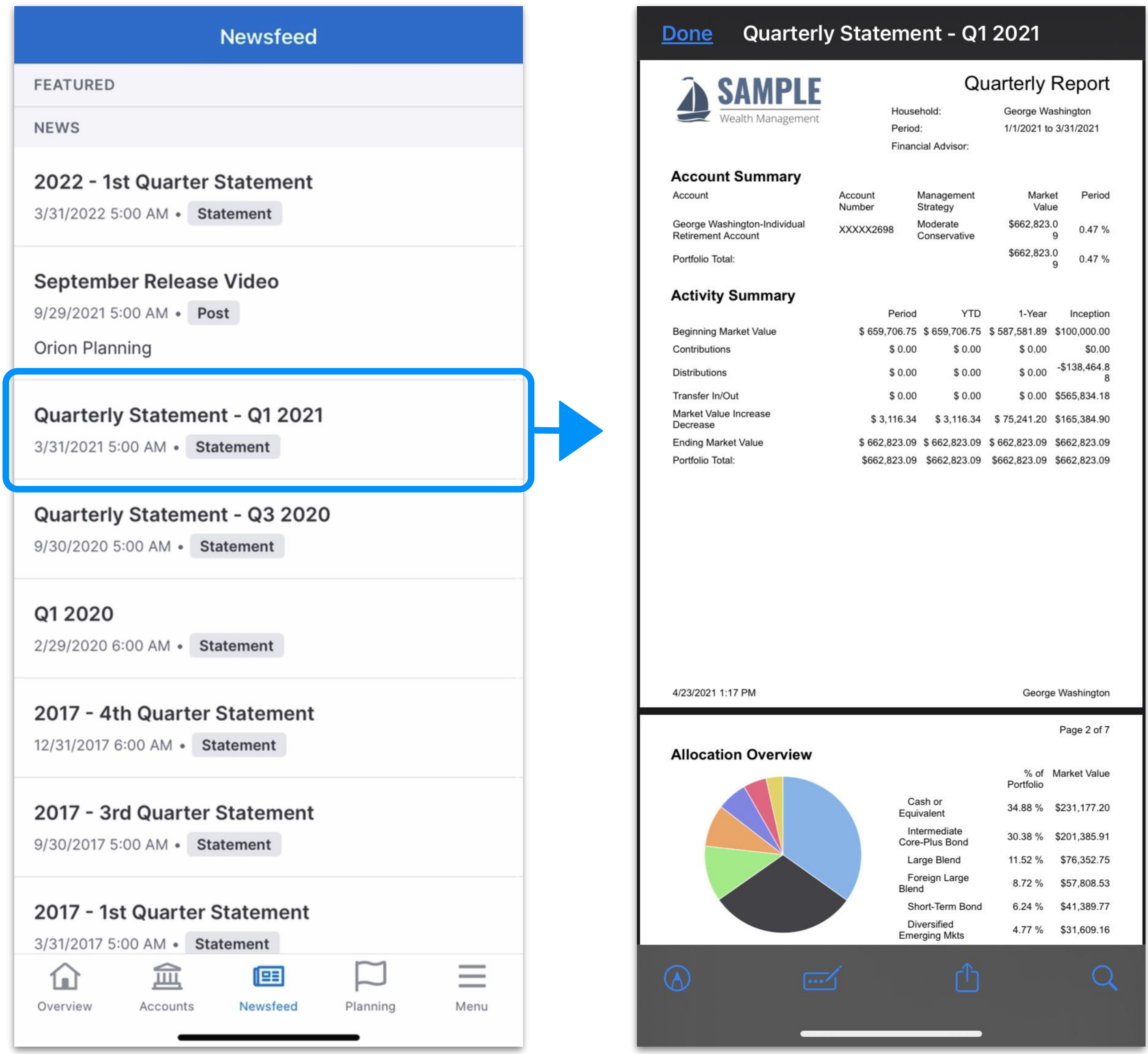


TIP:
When viewing a specific account as shown here, use the dropdown arrow at the top of your screen to switch between accounts.

Newsfeed Tab

Newsfeed Tab

Stay connected wherever you are using the Newsfeed Tab. Review posts and updates from your advisor, download and review portfolio statements, and more. Simply tap a newsfeed post to view its contents.



Planning Tab

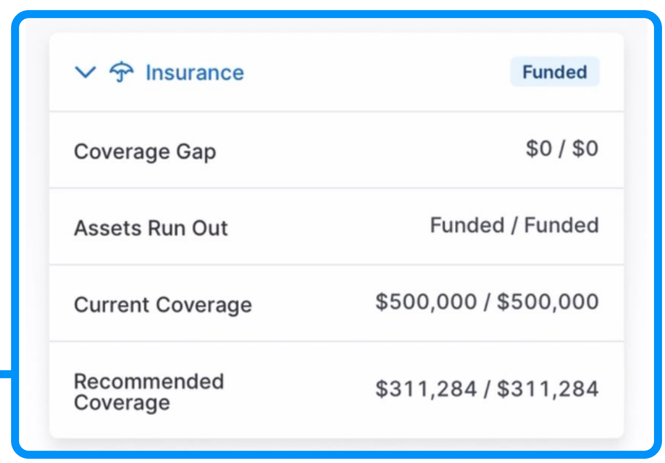
Planning Tab

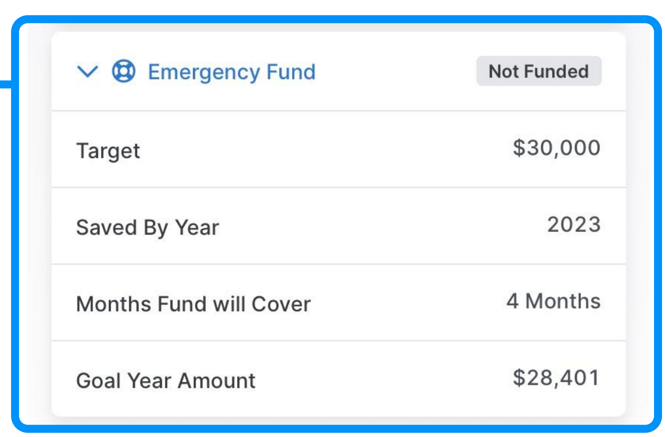
Use the Planning Tab to review your financial goals, retirement age, and net worth.

Goals

Select any goal to view additional details specific to that category.

These include whether the goal is funded or completed, how much progress has been made towards reaching that goal, and more.

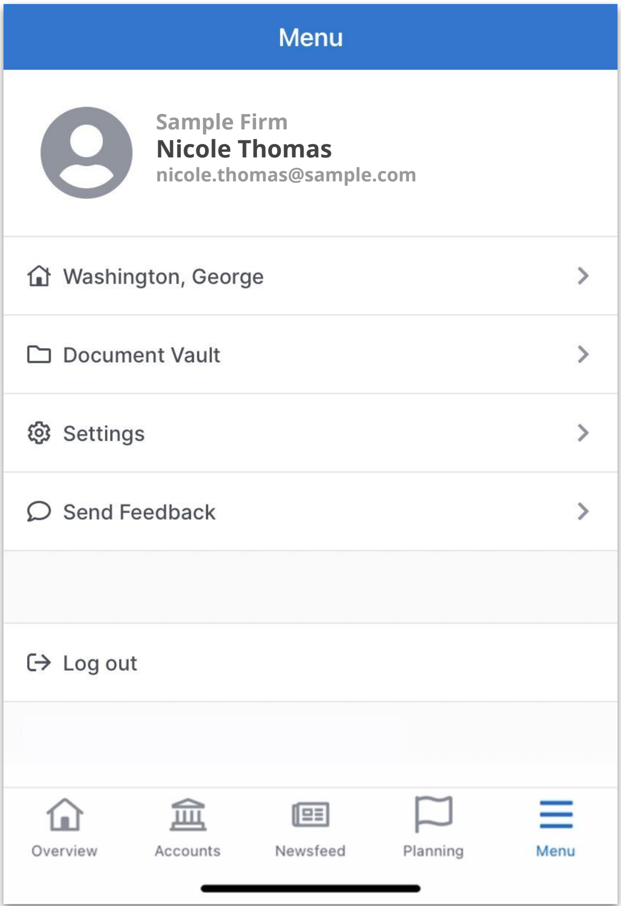




TIP:

Log into the desktop or browser version of the portal to view additional information about your financial plan.

Menu Tab



Menu Tab
Set app preferences, access files and disclosures, and submit feedback using the Menu Tab.

- Toggle between linked households*
- View and download files stored in the Document Vault
- Enable biometrics or reset your password
- Submit feedback or suggest a new feature
- Securely log out of the mobile app

***TIP:**
Select the row with the household icon to toggle between linked households, if applicable. The Switch Household menu will appear from the bottom of your screen, allowing you to switch profiles seamlessly.

For example, if your personal accounts and business accounts live in separate households, use this feature to switch between which set of accounts you're viewing.