

Client Hub user guide

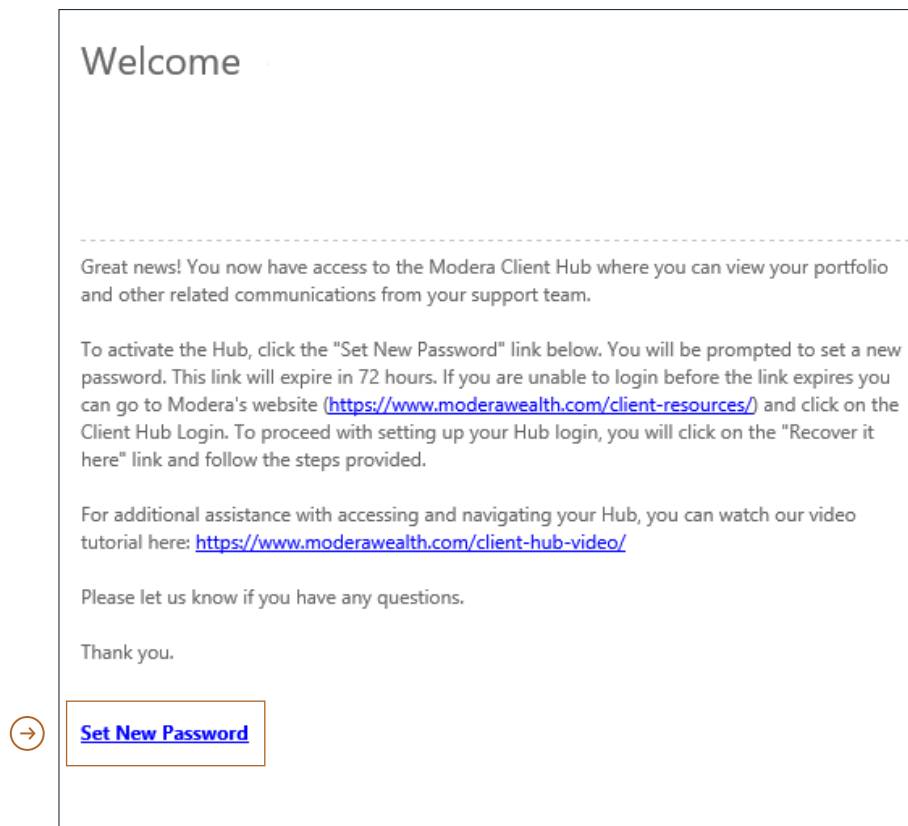


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Initial Registration

1. Modera will send you an email with the subject “**New Client Hub.**” If you do not receive an email, please check your spam/junk folder and then contact a member of your advisory team (if necessary). **Note:** When searching in spam/junk folder, the email is sent from: Modera Wealth Management <noreply@envestnet.com>
2. Click the “**Set New Password**” link. The link is valid for 72 hours. If unable to set a new password within the timeframe, simply contact a member of your advisory team to have a new email/link sent at your convenience.



3. Type your password in the boxes to confirm your password selection. Once completed, you will be directed to a login page to enter your username (email address where you received the registration link) and the password recently selected.

SET PASSWORD

Please set a new password for:
@hotmail.com

New Password

Confirm Password

SET PASSWORD

Passwords must meet the following requirements:

- Passwords must not contain your email address or parts of your full name that exceed two consecutive characters.
- Passwords must be at least 12 characters and must contain characters from three of the following four character categories:
 - Uppercase letters (A - Z)
 - Lowercase letters (a - z)
 - Numbers (0 - 9)
 - Non-alphanumeric (For example: !, \$, #, or % etc.)

4. Once logged in, you will need to set up your challenge questions. Be sure to select and answer a security question from each of the three drop down menus.

SET UP CHALLENGE QUESTIONS

Select and answer three challenge questions. When you sign into your portal from an unrecognized device, you'll be prompted to correctly answer one of these questions.

Question 1
What is the name of a college you applied to but didn't attend?

Answer 1

Question 2
Who is a memorable person from your childhood?

Answer 2

Question 3
What was the first live concert you attended?

Answer 3

SAVE

Challenge questions and answers must meet the following requirements:

- You must select three challenge questions to provide answers for.
- Answers must be unique across the three questions.
- Answers are not case sensitive and may contain up to 64 characters.

Initial Registration (Continued)

5. **(Optional):** If you would prefer to authenticate your login via a code texted to your mobile phone, simply fill in your mobile phone number and click **“Request Code.”** Enter the code texted to your mobile phone and click **“Save.”** Upon completion, your dual factor authentication option will be changed to mobile text. This can be changed at any time under the **“My Profile”** section.

If you prefer to continue to use the security challenge questions as your dual factor authentication option, simply click on **“I do not want to set up my phone.”**

The screenshot shows a form titled "SET UP MOBILE PHONE". At the top, there is a section for "Short Code Terms of Service" with four numbered points. Below this is a checkbox labeled "I acknowledge that I have read, reviewed, and agree to the Short Code Terms of Service." To the right of the checkbox is a link "I DO NOT WANT TO SET UP MY PHONE". Below the checkbox is a question: "Which phone number should we send verification codes to?" followed by a sub-question: "We will send a numeric verification code to your phone whenever you sign in from a device that we don't recognize." To the right of this question is a section titled "Mobile phone number requirements:" with three bullet points. Below the question and requirements are four input fields: "Phone Number", "REQUEST CODE", "Code", and "SAVE".

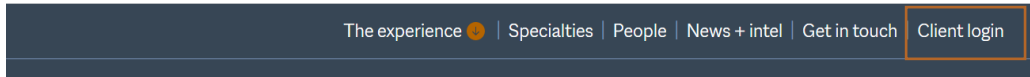
Annotations (arrows) point to the following elements:

- The checkbox for acknowledging terms.
- The "REQUEST CODE" button.
- The "Code" input field.
- The "SAVE" button.
- The "I DO NOT WANT TO SET UP MY PHONE" link.

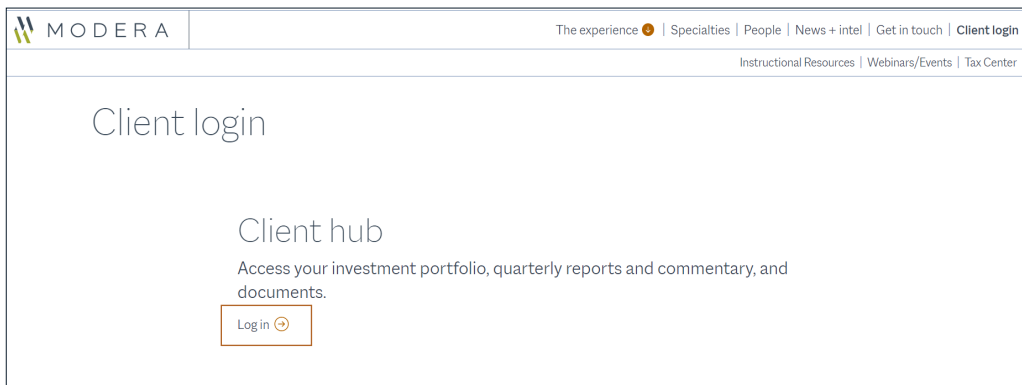
6. Acknowledge that you have read, reviewed and agree to the Terms and Conditions.

Accessing the Hub

1. Go to <https://www.moderawealth.com> and click “Client login” in the upper-right hand corner.



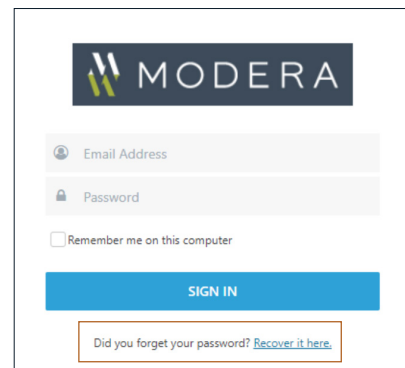
2. Once on the Client login page, click on the “Log In” button within the Client Hub box.



3. You will then type in your username and password and authenticate your login using challenge questions or mobile text.

How to Reset Your Password

If you have forgotten your password, simply click on the “Recover it here” link located below the sign-in button on the login screen.



How to navigate your dashboard

The screenshot shows the Modera dashboard interface. At the top left is the Modera logo. A navigation bar (2) contains 'ACCOUNTS', 'REPORTS', and 'DOCUMENTS'. A 'FIND DATA FOR' dropdown (3) is set to 'Sample, Sam & Susan (Sample-P1, Sample Portfolio)'. The user's name 'RAKHEE GOR' and 'Data as of 11/29/22' are in the top right. The dashboard features four main tiles: 'MANAGED MARKET VALUE' (\$3,662,471), 'INVESTMENT GAIN' (\$1,660,953), 'PORTFOLIO SUMMARY', and 'PERFORMANCE SUMMARY'. Each tile has a 'HIDE TILES' arrow (4) in the top right corner. The 'PORTFOLIO SUMMARY' and 'PERFORMANCE SUMMARY' tiles include date range toggles (5) for 'Inception to Date', 'Rolling 1 Year', and 'Year to Date'. A scroll bar (6) is located at the bottom of the dashboard.

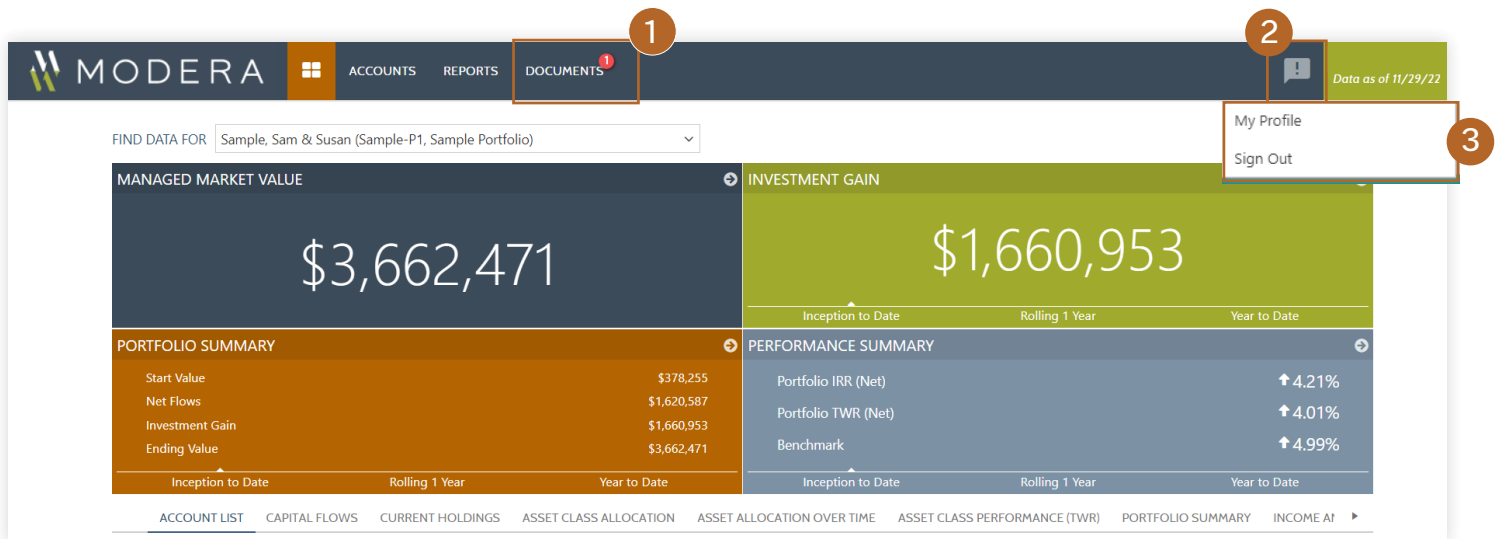
PORTFOLIO SUMMARY	
Start Value	\$378,255
Net Flows	\$1,620,587
Investment Gain	\$1,660,953
Ending Value	\$3,662,471

PERFORMANCE SUMMARY	
Portfolio IRR (Net)	↑ 4.21%
Portfolio TWR (Net)	↑ 4.01%
Benchmark	↑ 4.99%

1. The icon to access your personal dashboard.
2. Navigation Bar:
Accounts: Displays a list of your accounts and groups.
Reports: Detailed Performance, Holdings and Transactions reports.
Documents: Access your secure document vault where you can post and receive documents between you and your Modera Advisory Team.
3. Find Data For: Allows you to use the dropdown arrow to change the account/group you are wanting to display on your Dashboard, which will impact the results on your tiles.
4. Each of the 4 tiles displayed have a detailed report that you can navigate to by clicking on the “arrow” in the top right-hand corner.
5. Certain tiles will allow you to toggle between different date periods.
6. Reports Scroll Bar: Allows you to click on the report name to display the detailed report below your dashboard

These screenshots are intended only to demonstrate the content prepared for and available to clients via the Hub and are not intended to represent the performance, allocation or transactions of any actual client portfolio or of any expected portfolio performance. The portfolio performance and other portfolio figures shown here are presented for illustrative purposes only, are hypothetical and are not representative of or intended to be representative of the returns or performance experienced by any Modera client or of any expected returns or portfolio performance.

Dashboard notifications, announcements, and your profile

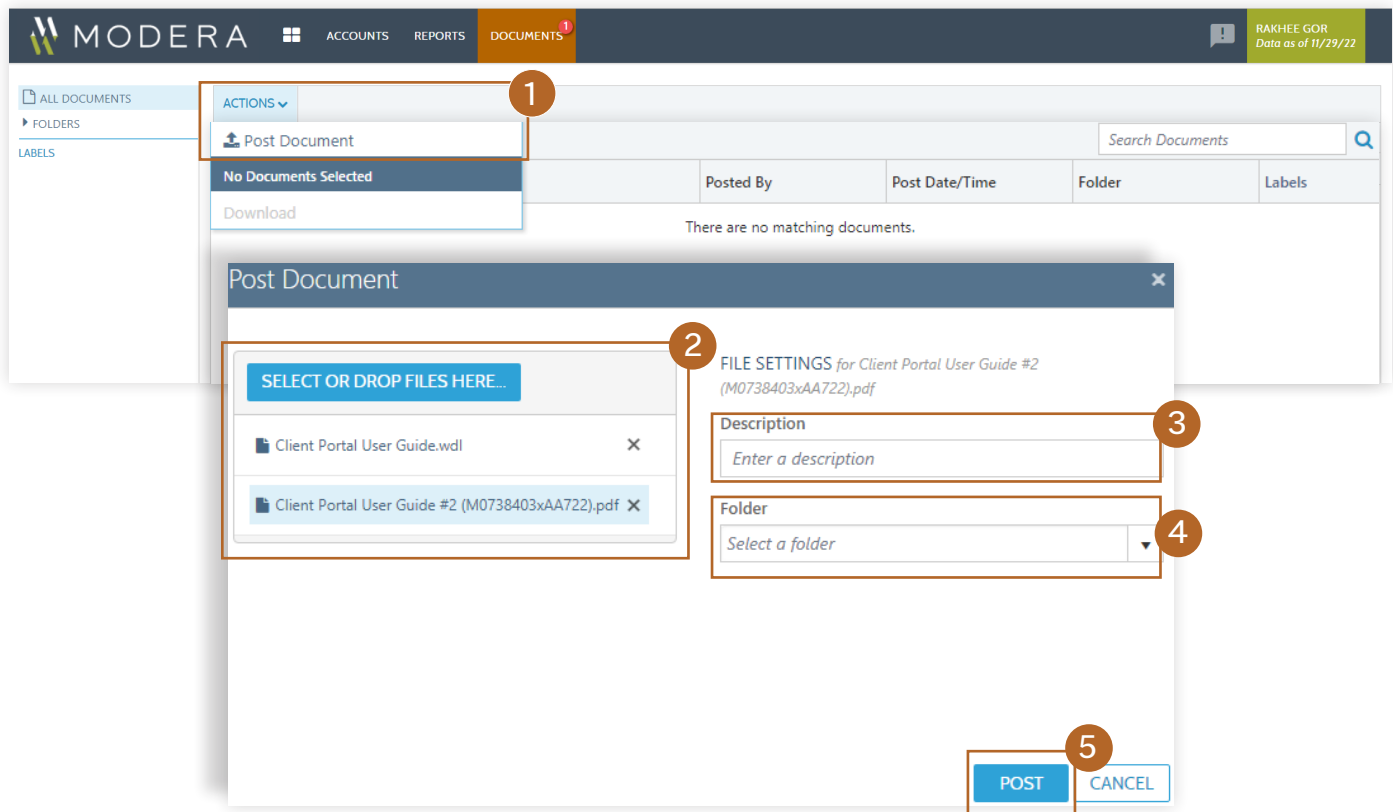


1. Anytime a new document has been posted, you will notice a number identifier on the Navigation Bar over the Documents tab.
2. All Modera announcements will be posted and viewed from this icon. Anytime a new announcement has been posted, you will notice a number identifier on the icon.

3. Navigate to your profile to change your password, update security questions and opt-in to text message authentication.

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How to post documents to the vault



1. Click on Actions and then in the dropdown you will select Post Document.

Once selected a pop-up will display which will allow you to attach and post a single or multiple documents at once.

You can select one or multiple files to be uploaded to your Document Vault. You will also have the ability to drag and drop files for upload as well.

2. Once you have selected your document(s) to be uploaded, you will then have the option to provide a description for your Modera Advisory Team.

3. Description: Allows you to provide a brief description of the document(s) you are uploading.

4. Folder: There is no need to utilize this option as your Modera Advisory Team will be able to access your posted document(s) instantly.

5. Once you have selected your document(s) to be uploaded and have provided a brief description, simply hit Post and you're done.

Your Modera Advisory Team will be notified as soon as you've posted your document(s).

How to download documents from the vault



1. Select the document(s) you would like to download from your Document Vault by clicking on the empty box next to the document name.

Note: please do not click on the title to open a document. If there is any information that we pre-filled on your behalf, it will not appear.

2. Once you've selected your document(s) you will click on Actions and then Download.
3. You should now be able to access or save the documents(s) to your computer. If you run into any issues when attempting to download please see the troubleshooting section below.

Troubleshooting

The main issue that prevents clients from being able to post or download a document is due to their computer's Operating System and/or Browser not being supported.

Once you have confirmed you are using a supported Operating System and/or Browser and you continue to have issues posting or downloading documents, it is recommended that you check your Browser settings to ensure you are not blocking popups.

If you are unable to access your account and are using the correct login, try clearing your browsing history, cookies and cached items. If you try to recover your password you will need to wait 20 minutes in between resets otherwise the account will lock.

If you continue to have issues please reach out to your Modera Advisory Team, they will be happy to assist.

Supported Desktop Browsers:

- Chrome (latest version)
- Edge (latest version)
- Firefox (latest version)
- Internet Explorer 11
- Safari (latest version)

Supported Mobile Operating Systems:

- Android 7+
- iOS 10+

Supported Desktop Operating Systems:

- iOS (latest version)
- OS X/Mac OS (latest version)
- Windows 7+



MODERA
WEALTH

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