Welcome to The Center's Client Portal!

Client Portal gives you access to much of the information we share with you during our financial planning meetings together, now available whenever you wish. Let's get started!

First, what's the difference between The Center's Client Portal and Raymond James Client Access?

The Center's Client Portal	Raymond James Client Access
• Robust performance reporting, including asset allocation reports • Document Vault • Contributions, withdrawals, and transactions • Contact information for your Service Team	• Basic performance reporting • Raymond James statements, including tax reports • Trade confirmations • Prospectus and other investment documents • Mobile check depositing capabilities

Okay, got it. Now, where do I start?

The first thing you see when you log in are colorful tiles. Here's what they mean:

- Balance: Shows total value as of the close of the prior business day (does not include assets managed outside your overall asset allocation)
- Performance and Investment Gain: Offers different return perspectives over a customizable time period (click on the dates at the bottom to look at different time period returns). All returns are time-weighted and net of any fees deducted from your account
- Net Contribution and Contribution or Withdrawal Rate: Shows how much has been deposited or withdrawn from the account for the time period selected

Why do the values look a little different from Raymond James Client Access?
Raymond James Client Access may differ slightly, as Client Access updates some pricing and position data in real-time and does not separate assets managed outside of your asset allocation.

Does this include all my accounts?

Typically, the default view when you log in displays data for all of your accounts. If you click on the drop down menu next to "Find Data For," you will see all of your options. For example, if you click on groups, you may see one group or several different groups (e.g. your main household or perhaps your kids' 529 accounts). You can even choose to view data for a single account.

Now that I understand the home page, what else can I find within the Client Portal?
The Center's logo in the upper left corner will always bring you back to the home screen.

To the right of the logo, you will find the Reports menu. Hover over "Reports" to view options available within this menu. Listed below is an overview of the reports available (keep in mind that each report will only display data for what you have selected above in "Find Data For"):

Report	What it means
Account Performance	Performance for various time periods, net of any fees deducted from the account. Performance is segmented by the asset class of your holdings, each compared to a relevant benchmark. At the bottom, you'll see an "Allocation Weighted Benchmark," which weights all of the different asset-specific benchmarks according to your portfolio weights. This paints a picture for how your account did compared to an index-only benchmark (keep in mind that no fees are deducted from the benchmark).
Comparative Review*	Provides a snapshot of account value as of the prior business day. Also includes the value of account that is in cash or money market investments.

Asset Allocation	Asset Allocation provides a high-level snapshot of your account's weighting to each asset class. The pie charts are a side-by-side comparison of your current allocation versus our recommended allocation for your portfolio. Asset Allocation Bar Chart (accessible by changing the Report View) shows a different picture of your current-versus-recommended allocation. The black bar shows our target (the middle hash line) and the acceptable range for this asset class (the end black lines). Note that the black bar is only available when the "Find Data For" is selected for a Reporting Group.
Holdings	Summarizes your holdings by The Center's asset categories. Bond categories include Core Fixed Income and Strategic Income. Equity categories including U.S. Large Cap, U.S. Small & Mid Cap, International Large Cap, International Small & Mid Cap, and Strategic Equity. Keep in mind you may not own every category, as this depends on your unique portfolio needs. Finally, you will find your cash balance at the bottom, as well as any "Unmanaged Assets" (assets held outside of your target allocation).
Capital Flows*	Displays the value of your account versus your net contributions since inception. Below the chart, you'll find a table of your beginning value each year, total addition and subtractions (cash and securities), ending value, and your deposit with withdrawal rate for that year. Finally, at the bottom you will see an itemized list of the transactions that comprise this data.
Realized Gain/Loss*	An estimation of realized gains and losses for the current year-to-date period. While this is not a substitute for your tax statements from Raymond James, it can be helpful to see where you are throughout the year based on the trades that have occurred in your taxable accounts.
Transactions	Account transaction details listed in reverse chronological order.

*These reports are not available in the mobile app.

What is this Document Vault all about?

Document Vault is a secure way to transfer documents between you and The Center.

Downloading Documents from The Center	Posting Documents to The Center
Click on the download icon or select the checkbox and choose the Download function from the Actions Menu.	Select Post Document from the Actions Menu and navigate to the document's location on your computer (we'll be notified to go retrieve it).

You may see some Center-created folders within your Vault, within which you can choose to save documents.

What information can I find under Service Team?

Here you can see photos and contact information for your dedicated Center Team.

What if I need to reset my password? And how do I log out?

Reset your password at any time by contacting us by email or phone. The Sign Out button is located top right corner of your screen under your name.

Anything else before we go?

Next to your name, you'll find an announcement screen. If you see a red exclamation point here, look for a notice we have posted to you or an alert that a document has been shared for you to view.