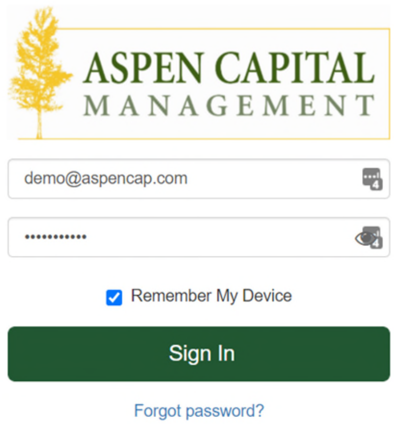
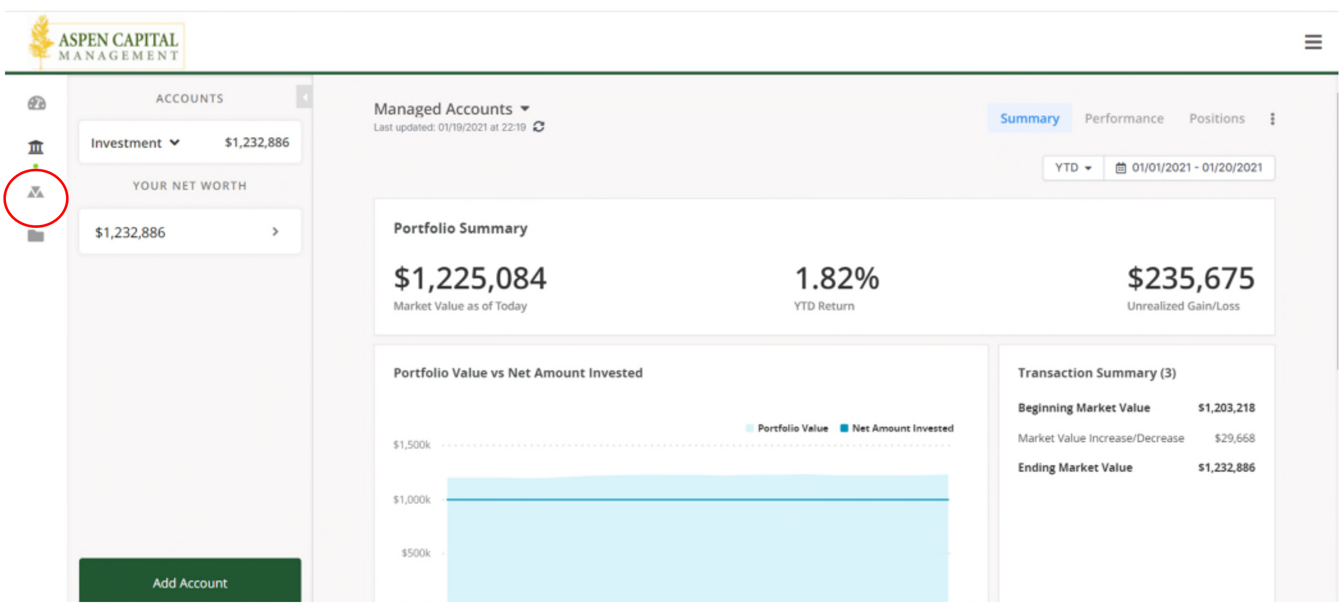
How to View Your Financial Plan Success Dial in the Client Portal

1. Log into the client portal with your username and password

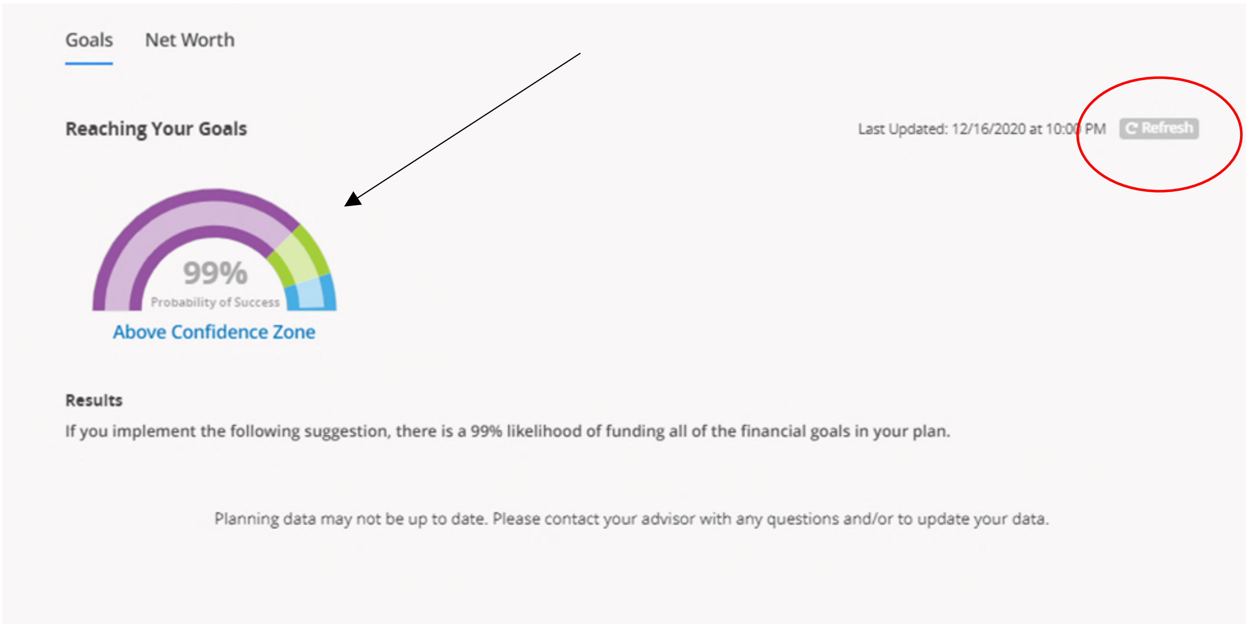


2. From the portal homepage, click on the triangle icon on the left side of the screen to access financial planning:



3. In the financial planning view, the first thing you will see will be the success dial of the Monte Carlo simulations for your financial plan.

4. For the most up-to-date probability of success, click the refresh button in the top right corner of the screen.



5. To view the Net Worth information associated with your financial plan, click on the "Net Worth" tab next to the Goals tab in the upper left of the screen.