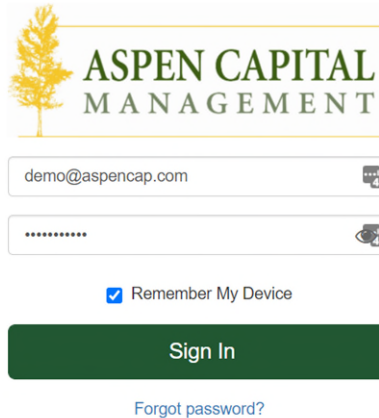


How to View Your Financial Plan Success Dial in the Client Portal

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



ASPEN CAPITAL MANAGEMENT

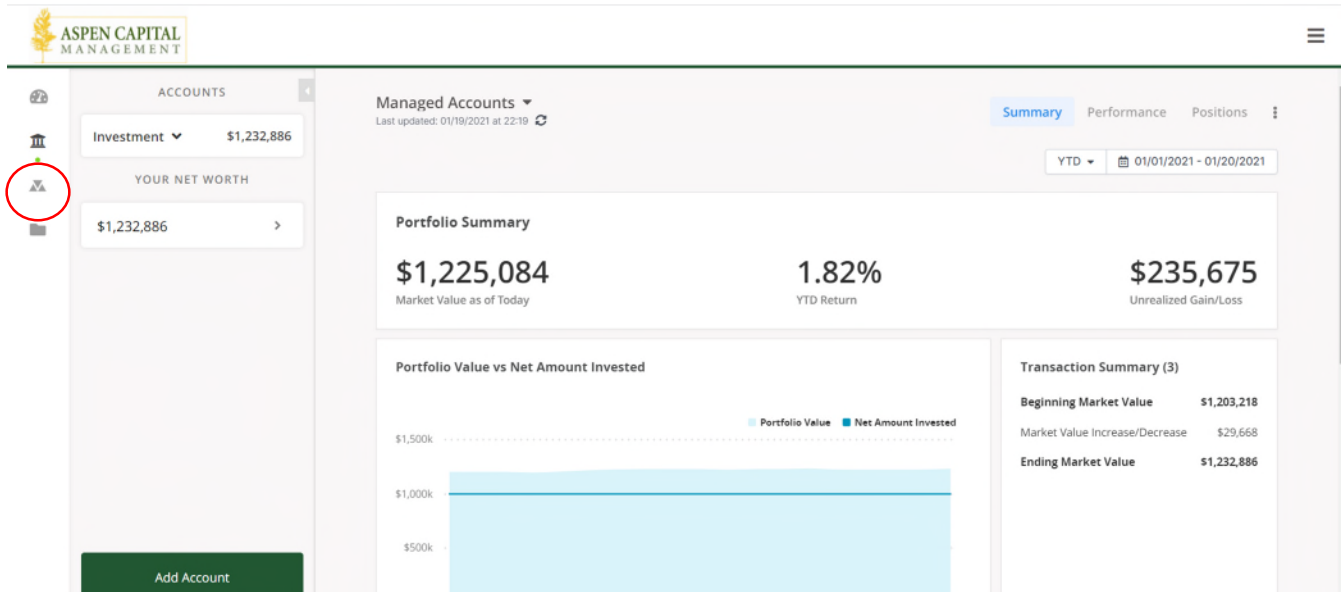
demo@aspencap.com

Remember My Device

Sign In

[Forgot password?](#)

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



ASPEN CAPITAL MANAGEMENT

ACCOUNTS

Investment \$1,232,886

YOUR NET WORTH

\$1,232,886

Managed Accounts

Last updated: 01/19/2021 at 22:19

Summary Performance Positions

YTD 01/01/2021 - 01/20/2021

Portfolio Summary

\$1,225,084 Market Value as of Today

1.82% YTD Return

\$235,675 Unrealized Gain/Loss

Portfolio Value vs Net Amount Invested

Transaction Summary (3)

Beginning Market Value	\$1,203,218
Market Value Increase/Decrease	\$29,668
Ending Market Value	\$1,232,886

Add Account

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.

Goals **Net Worth**

Reaching Your Goals

Last Updated: 12/16/2020 at 10:00 PM [Refresh](#)

99%
Probability of Success
Above Confidence Zone

Results
If you implement the following suggestion, there is a 99% likelihood of funding all of the financial goals in your plan.

Planning data may not be up to date. Please contact your advisor with any questions and/or to update your data.

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.

Goals **Net Worth**

Reaching Your Goals

Last Updated: 12/16/2020 at 10:00 PM [Refresh](#)

99%
Probability of Success
Above Confidence Zone

Results
If you implement the following suggestion, there is a 99% likelihood of funding all of the financial goals in your plan.

Planning data may not be up to date. Please contact your advisor with any questions and/or to update your data.