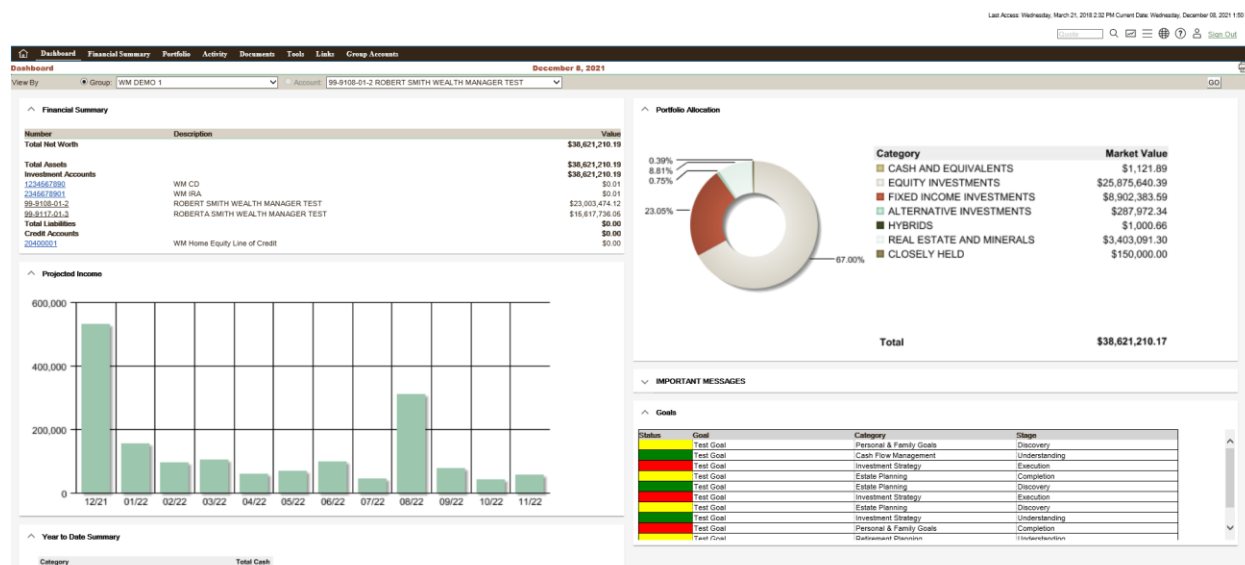


Wealth Manager – Homepage Guide

Welcome to Wealth Manager!

The first page you will see in Wealth Manager is your Dashboard Homepage. The Dashboard provides quick links to frequently visited features in Wealth Manager. You will see the [Financial Summary](#), [Portfolio Allocation](#), [Projected Income](#), [Important Messages](#) and [Year to Date Summary](#) previews. Each of the previews shows a condensed version of data taken directly from that section within Wealth Manager. Click on any preview to take you to the corresponding page where you can view detailed information.

Dashboards are viewable by Account Group, selected using the Group Filter. Account Groupings can be setup or modified under the Group Accounts menu on the Navigation Bar.



IMPORTANT MESSAGES

Commerce Trust Company Research and Insights

Please check out our research and insights from the Commerce Trust Company. Thank you.

[Click Here](#)



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Wealth Manager – Homepage Guide

Description of Features on Dashboard Homepage

Financial Summary – Provides a quick balance summary for all your Commerce accounts.

Portfolio Allocation - Provides an aggregated view of the portfolio for all accounts in the active group depicted in a donut graph.

Projected Income - Provides projected income for the active group of accounts for one.

Year to Date Summary - It shows transactions for the current year based on high level categorization.

Important Messages – Provides an area to view important messages from Commerce Trust Company.

Goals Feature – Displays your planning goals and information on their progress.

^ Goals

Status	Goal	Category	Stage
Yellow	Test Goal	Personal & Family Goals	Discovery
Green	Test Goal	Cash Flow Management	Understanding
Red	Test Goal	Investment Strategy	Execution
Yellow	Test Goal	Estate Planning	Completion
Green	Test Goal	Estate Planning	Discovery
Red	Test Goal	Investment Strategy	Execution
Yellow	Test Goal	Estate Planning	Discovery
Green	Test Goal	Investment Strategy	Understanding
Red	Test Goal	Personal & Family Goals	Completion
Yellow	Test Goal	Retirement Planning	Understanding

Status – This is a stoplight field that displays your goals status as a color to represent if they are on target. The colors display as:

- Green – On Target
- Yellow – In Danger of missing Target
- Red – Off Target

Goal Field - A Short Description of the goal.

Category Field – The planning area for the goal.

Stage Field – Field that shows what stage the goal is in. The options are detailed below:

- **Discovery** - the initial stage of a goal. Conversations are occurring on the scope and definition of completion.
- **Understanding** – creation of the plan that will lead to completion.
- **Execution** – the active process of achieving the goal – putting the plan into action.
- **Completion** - the objective of the goal has been accomplished.



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