

# TrustCore Client Portal

## What is the Client Portal?

1. Gives you secure access from a PC, Mac or mobile device to your account information – current holdings, asset allocation, and performance information across **ALL** your investments including Schwab, private investments, outside retirement accounts, education accounts, etc.
2. Enables the electronic delivery of quarterly reports, billing statements, and other important documents. Upon delivery, you will receive an email notification alerting you that a new report is available to view on the portal.
3. From a PC or Mac, it allows for the secure exchange of documents and will replace, in most cases, our current method of sending encrypted email.

## What is the Security of the Portal?

- Password activation emails expire after 72 hours. Client login sessions expire after 15 minutes.
- Dual-factor authentication is employed. In addition to providing your password, each time you sign in from a new, untrusted device, you must answer one of your self-selected challenge questions.
- Information on the portal is encrypted.
- The portal is hosted at data-services firm Rackspace. Rackspace maintains the highest industry standards with SSAE16 Type II certification and undergoes annual audits.

## How is the Client Portal Activated?

Your TrustCore service team will send you an **activation email** that will contain a Web link to guide you through the process to setup your portal password.

- The activation email will be initiated by TrustCore ([noreply@investnet.com](mailto:noreply@investnet.com)).
- You will have 72 hours from receipt of this email to gain access and setup your password.
- **In the body of the email, you will click the BLUE Web link to start the process of creating a password.**
- Once your password is created, you will also go through an additional process to set up THREE challenge questions to be used in the future if you:
  - a) need to utilize the password recovery process OR
  - b) for extra security if you log in from a new, untrusted device (e.g. you get a new laptop).

## **How do I Login into My Client Portal?**

### **From a PC or Mac**

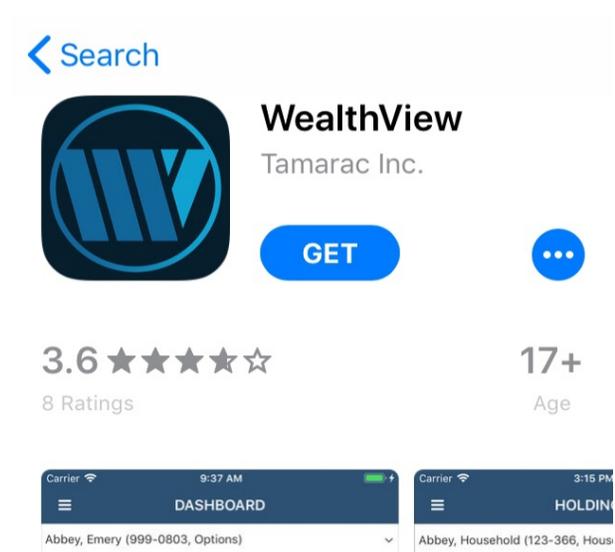
We strongly recommend using **Google Chrome** to access your client portal.

There are TWO different ways to login to your client portal from a PC or Mac:

1. In Google Chrome, navigate to [www.trustcore.com](http://www.trustcore.com) and click “Client Login” on the top right of the menu bar. From the clicked-through page, click “TrustCore Client Portal Login”. **OR**
2. In Google Chrome, navigate directly to <https://trustcore.portal.tamaracinc.com>

### **From a Smartphone**

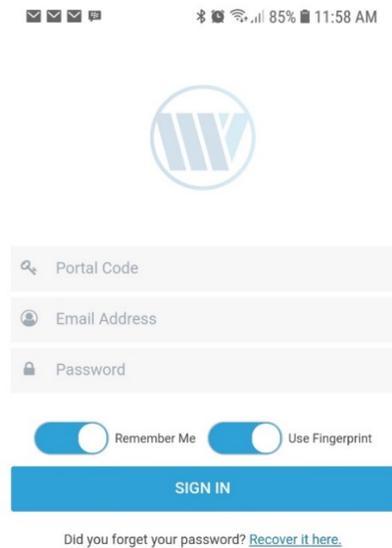
Go to the App Store on an iPhone or the Google Play Store on an Android phone and search for the **WealthView** app by Tamarac, Inc. Install and open the **WealthView** app.



## Logging in from the WealthView Mobile App

In the screenshot below of the mobile app login screen, there are three pieces of information required to login:

1. Portal Code = TrustCore
2. Email Address = Your email address
3. Password = The password you created in the activation process



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Portal Code

Email Address

Password

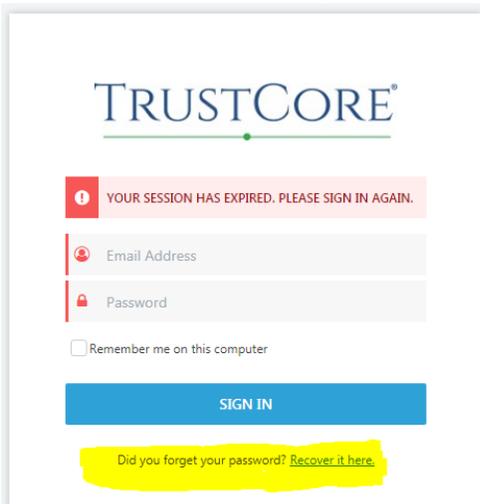
Remember Me     Use Fingerprint

**SIGN IN**

Did you forget your password? [Recover it here.](#)

## How do I Recover/Reset My Password?

Life happens, and we forget passwords. If this happens, go to the portal login page (see instructions above) and click on the “Recover it here” link next to the “Did you forget your password?” question at the bottom of the Web page. See the screenshot below for an example.



TRUSTCORE®

**YOUR SESSION HAS EXPIRED. PLEASE SIGN IN AGAIN.**

Email Address

Password

Remember me on this computer

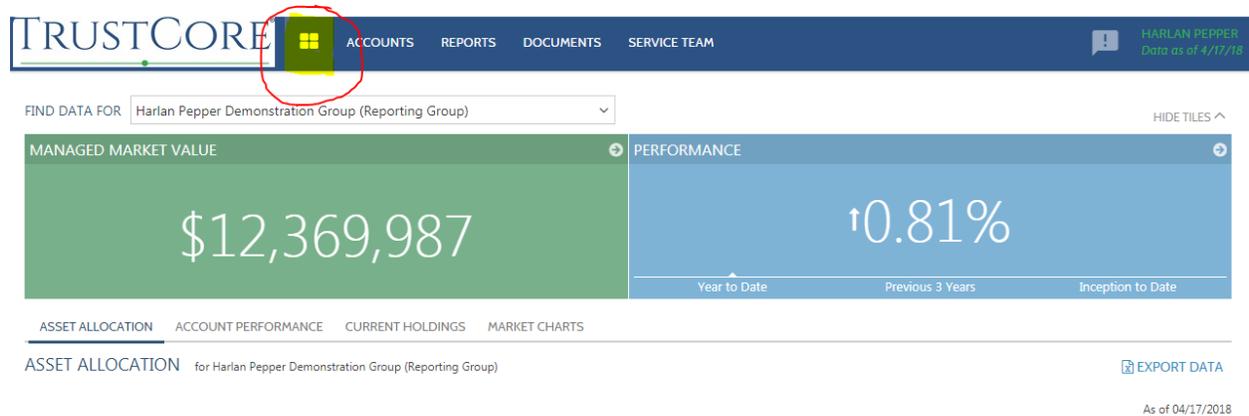
**SIGN IN**

Did you forget your password? [Recover it here.](#)

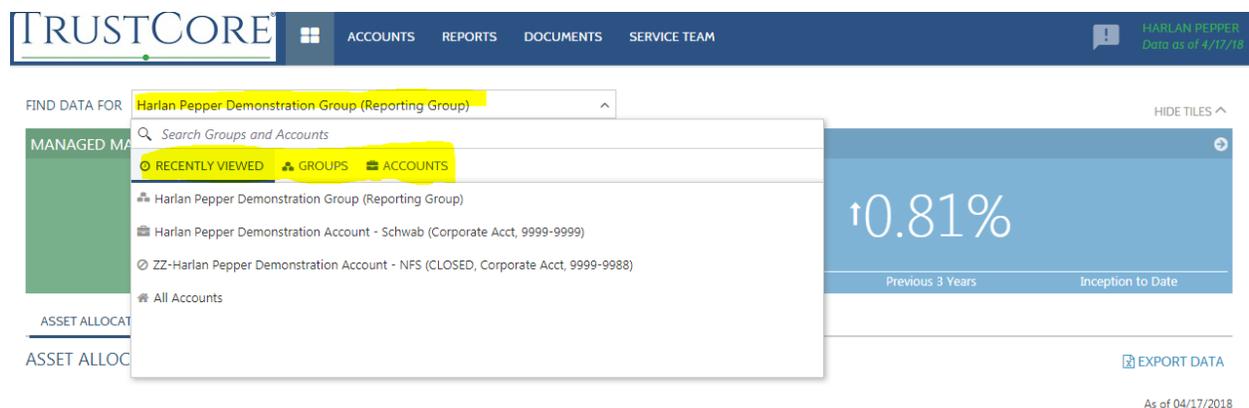
## How do I Navigate in the Client Portal?

### The Dashboard

This section gives you summary account, performance and allocation information in a graphical/tabular format. You can click through on many of the items displayed on the dashboard to get access to more detailed information. You can navigate back to the dashboard by clicking on the small window icon immediately to the right of the TrustCore logo (red circled and highlighted in the screenshot below).



If you have more than one account or reporting group, then you can navigate between those by clicking the "Find Data For" box highlighted in the screenshot below.



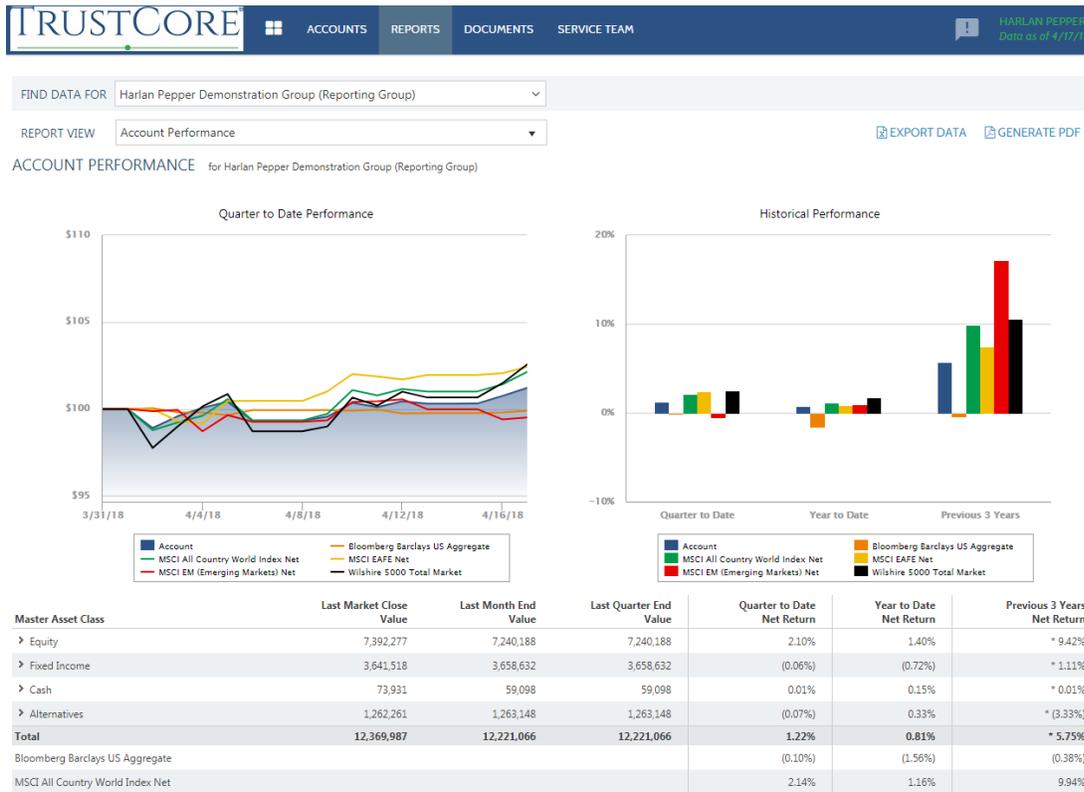
## Accounts

By clicking on the Accounts page, you can access the balance and performance information of the accounts in your TrustCore reporting group. By clicking the down arrow next to the account name (highlighted in yellow in the screen shot below), you can gain access to more detailed reports on your account or reporting group.

Account Name ↑	Account Number	Account Type	Current Value	Inception Date	Year to Date Net Return
Harlan Pepper Demonstration Account - Schwab	9999-9999	Corporate Acct	12,369,986.81	06/29/2017	0.81%
▶ Harlan Pepper Demonstration Group		Reporting Group	12,369,986.81	06/29/2017	0.81%

## Reports

The reports section gives access to multiple reports. Simply hover your mouse over “Reports” and choose the report you would like to review. The screenshot below shows the Account Performance Report, one of many reports available under this menu item.



## Documents (Vault)

As a reminder, we strongly recommend using **Google Chrome** to access your portal. The documents vault section is where you can access reports and documents that have been posted to your portal. When you have new documents to review, there will be a **RED** number icon next to Documents on the menu bar indicating a new document(s) has been posted by TrustCore.

The Vault is also where you can upload documents that you would like to share with your TrustCore service team. To upload/post a document, click on Actions (highlighted in yellow in screenshot below) and choose "Post Document" and then navigate to the document on your PC/Mac that you would like to upload. Documents may only be uploaded from a PC or Mac; you are not able to upload documents from the mobile app. Documents should be posted to one of FOUR folders. These are:

- Investment Reports
- Billing Statements
- Tax Forms
- Other Forms

Type	Name/Description	Posted By	Post Date/Time	Folder	Labels	Size
	<a href="#">Harlan Pepper Demonstration Group.pdf</a> 9/30 Quarterly Report	Trustcore Support	12/12/2017 11:01 AM	Investment Reports		616.9
	<a href="#">Harlan Pepper Demonstration Group.pdf</a> 9.30.17 Quarterly Report	Gary Dean	12/08/2017 08:40 AM	Investment Reports		618.2

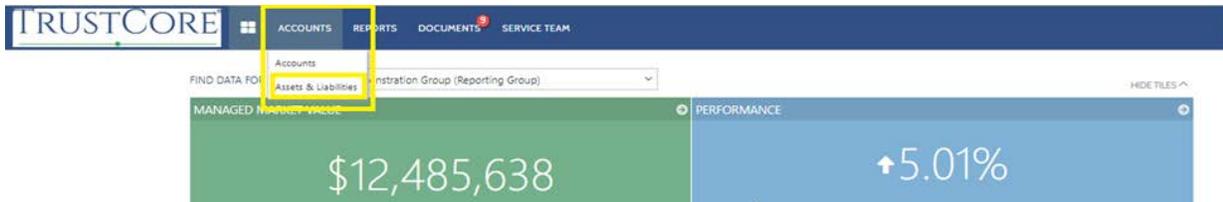
## Service Team

The service team section shows the members of your TrustCore service team along with their phone numbers and emails addresses.

## Can I Add Outside Assets and Liabilities to My Portal?

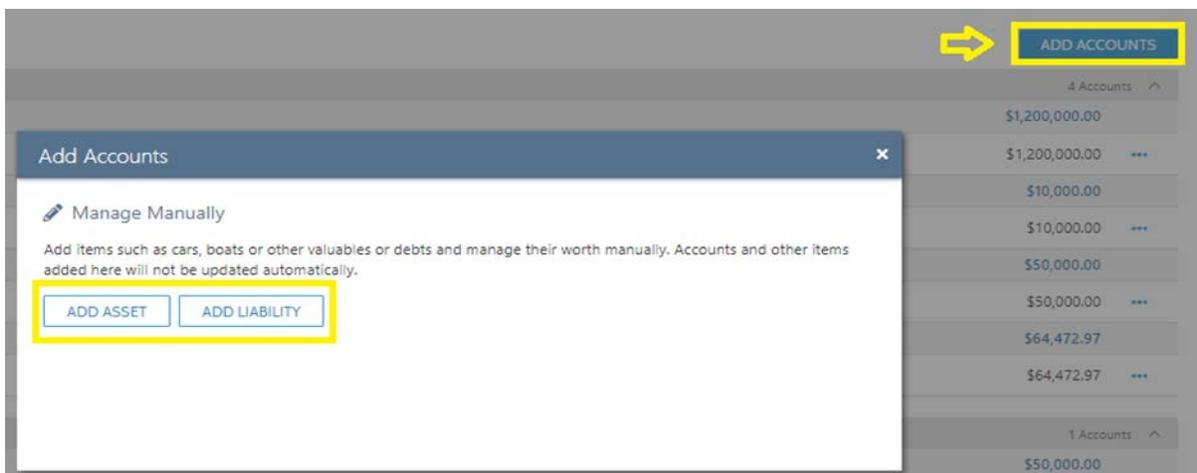
Yes. You can add outside assets (e.g. a second home) and liabilities (e.g. a mortgage) to the portal. These assets/liabilities can be updated with new values by you or your TrustCore service team on an as needed basis. These assets and liabilities will populate into your Net Worth Report that is available under the Reports menu item.

To add a new asset/liability or edit a value, you will hover over 'Accounts' at the far left to see a drop-down menu as shown in the screenshot below and select "Assets & Liabilities".



From the Assets & Liabilities Web page, you can also add, edit or delete assets and liabilities.

To add an asset or a liability, click on 'Add Accounts' and choose either an asset or a liability.



From there, select the type of asset or liability and complete the description, primary owner and owner type and the value or balance.

To edit an asset or a liability, click on the 3 dots to the right of the asset or liability.

ASSETS				4 Accounts
Home				\$1,200,000.00
House on the Beach	Individual   Harlan Pepper	As of 2/14/2020		\$1,200,000.00
Other Asset				\$10,000.00
Belle's 401k	Individual   Belle Pepper	As of 6/13/2018		\$10,000.00
Vehicle				\$64,472.97
Lexus	Joint	As of 6/18/2018		\$64,472.97
Whole Life				\$64,472.97
Lincoln Whole Life #123456789	Individual   Harlan Pepper	As of 3/31/2018		\$64,472.97