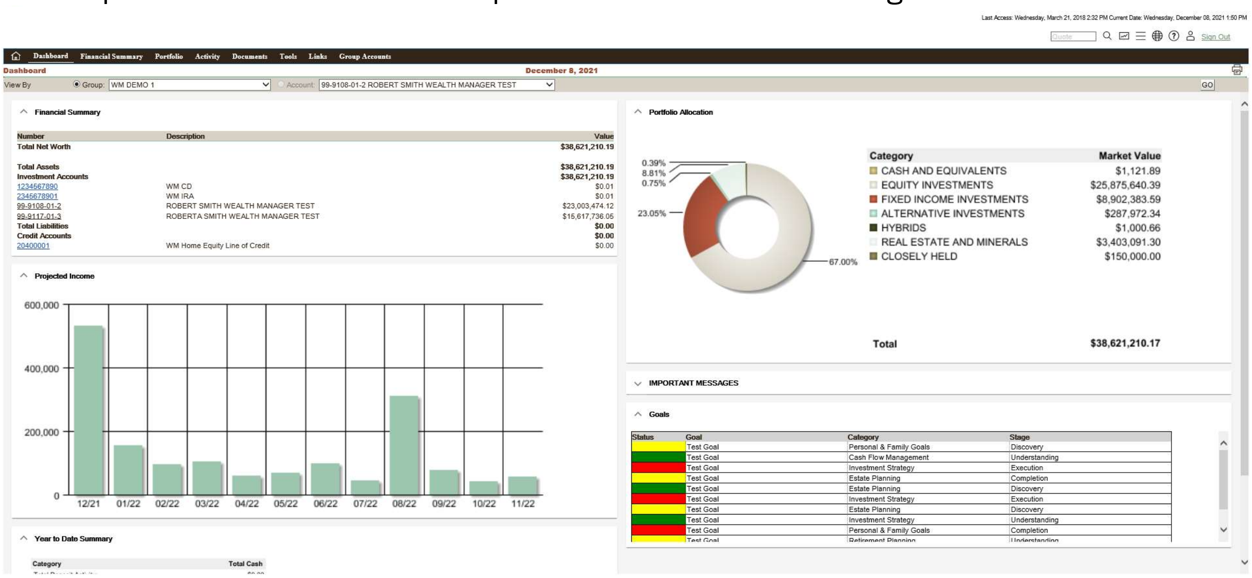
OVERVIEW GUIDE

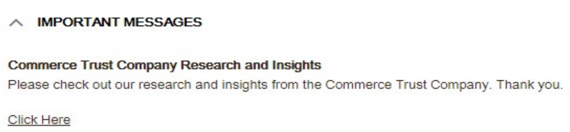
WEALTH MANAGER

Welcome to Wealth Manager!

The first page you will see 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.





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
	Test Goal	Personal & Family Goals	Discovery
	Test Goal	Cash Flow Management	Understanding
	Test Goal	Investment Strategy	Execution
	Test Goal	Estate Planning	Completion
	Test Goal	Estate Planning	Discovery
	Test Goal	Investment Strategy	Execution
	Test Goal	Estate Planning	Discovery
	Test Goal	Investment Strategy	Understanding
	Test Goal	Personal & Family Goals	Completion
	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