



## The P&A Portal

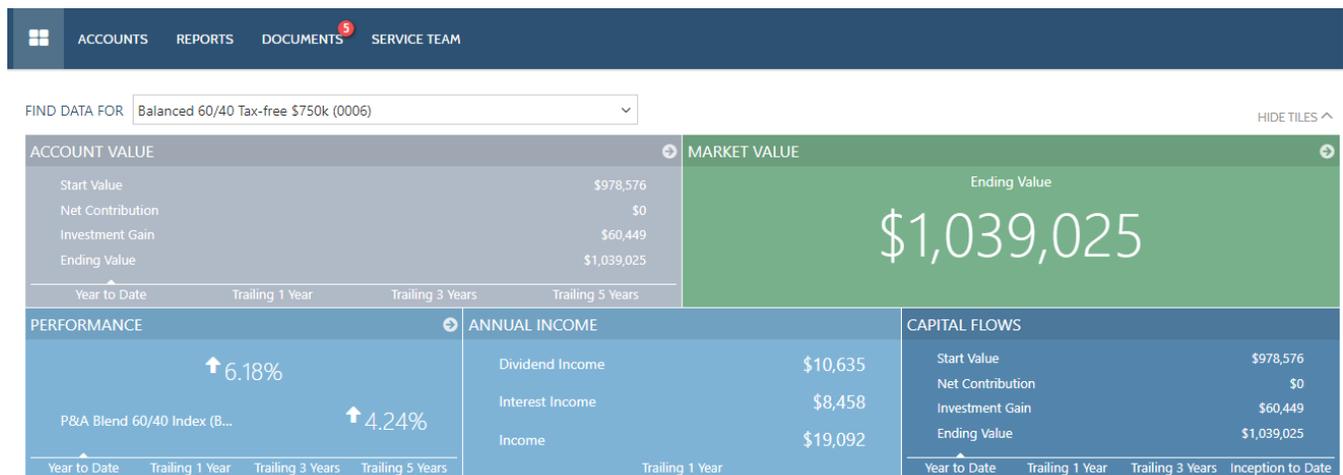
by Trey Pittenger

One of the standards to which P&A has always held ourselves is delivering a high degree of transparency to you, our client: transparency with fees, with conflicts of interest, and with how we are managing your hard-earned investments dollars. We believe transparency can lead to better understanding, which can inspire confidence, which can ultimately lead to success.

So, in the spirit of transparency, we are highlighting some key aspects of the P&A Portal so that you can better understand what you are viewing and the features available to you.

### The P&A Portal – Desktop or Tablet Version

- The Portal Dashboard features Five Tiles which highlight key components of your account(s). The tiles most often viewed by users are Account Value and Performance. Account Value displays the start value of your account within a given time frame (you can change this with the carrot below), along with contributions or withdrawals and pure investment gain over that time period. Performance will show your account performance, net of fees, compared to the appropriate benchmark of your accounts, and the carrot again allows you to select different time frames as well.
- The arrows in the top corner of each Tile will expand the view to show data in chart form, a user-friendly way to visualize your accounts over time.



## P&A Portal – Headers

- Headers are shown below the Tiles and will give you additional insights on key aspects of your account(s), including:
  - Current holdings
  - Realized gains and losses
  - Projected Income
  - Buys and Sells

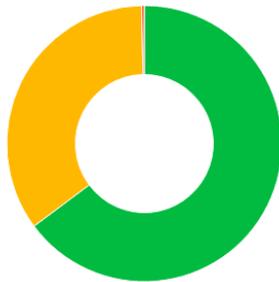
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<a href="#">ASSET ALLOCATION</a>	<a href="#">CURRENT HOLDINGS</a>	<a href="#">COMPARATIVE REVIEW</a>	<a href="#">PERFORMANCE BY ASSET CLASS</a>	<a href="#">REALIZED GAINS/LOSSES</a>	<a href="#">PROJECTED INCOME</a>	<a href="#">BUYS &amp; SELLS</a>	<a href="#">CAPITAL FLOWS</a>	<a href="#">NET WORTH</a>
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ASSET ALLOCATION for Balanced 60/40 Tax-free \$750k (0006)

As of 08/24/2020



Asset Class	Current Value	Current Percent
Equities	673,338.59	64.80%
Fixed Income	362,568.96	34.90%
Cash & Cash Equiv.	3,117.24	0.30%
<b>TOTAL</b>	<b>1,039,024.79</b>	<b>100.00%</b>

## Yodlee account integration feature

- One of the Headers is Net Worth. If you click on this Header, you can utilize the Yodlee feature, which allows you to:
  - Link held-away assets and liabilities to get up-to-date values for external reports.
  - See all your financial accounts summarized on the Net Worth report.
  - Show a full financial picture in one place.
  - See historical values for external accounts to track changes in Net Worth over time.

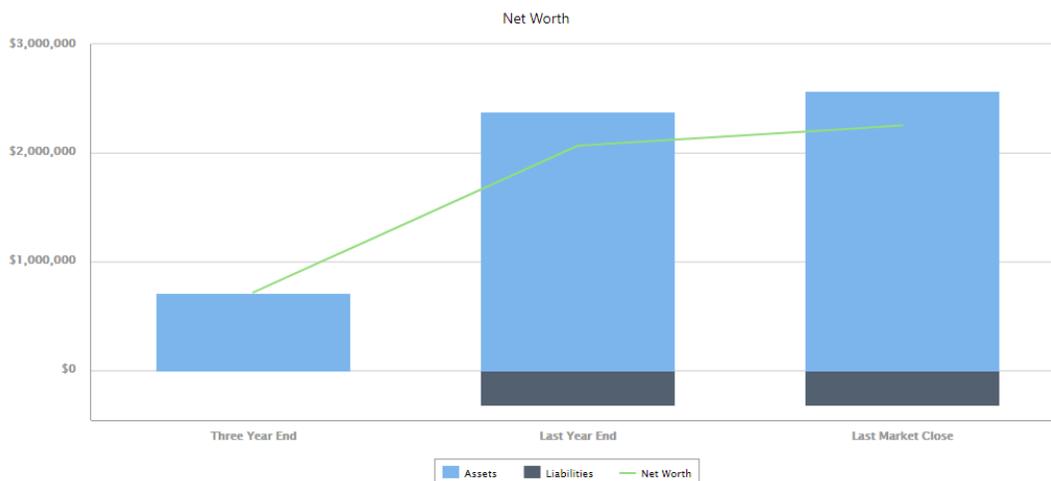
To set up this feature, simply email [diane@pittand.com](mailto:diane@pittand.com)

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[REALIZED GAINS/LOSSES](#)   [PROJECTED INCOME](#)   [BUYS & SELLS](#)   [CAPITAL FLOWS](#)   [NET WORTH](#)

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[MANAGE ACCOUNTS](#)



## P&A Portal – Document Vault

- The Document Vault feature on the P&A Portal will allow you to view and retrieve documents posted to your client portal, including quarterly statements, billing statements, and other misc. items.
- You can also use this as a Secure Vault to store and categorize other financial statements. Simply click on Actions – Post to securely save any document to your P&A Portal.

<input type="checkbox"/>	Type	Name/Description	Posted By	Post Date/Time	Folder	Labels	Size
<input type="checkbox"/>		<a href="#">Privacy Policy.pdf</a> 2020 Privacy Policy	Kristin Kliewer	07/15/2020 04:01 PM	P&A Miscellaneous	2020	59.5 KB
<input type="checkbox"/>		<a href="#">December 2018 Part 2A of Form ADV.pdf</a> 2018- ADV Part 2A	Kristin Kliewer	01/15/2019 02:19 PM	P&A Miscellaneous	2018	592.5 KB
<input type="checkbox"/>		<a href="#">20190102134204684_0001.pdf</a> P&A Contract	Kristin Kliewer	01/02/2019 03:32 PM	P&A Miscellaneous	2019	86 KB
<input type="checkbox"/>		<a href="#">PA Holiday Card 2018.pdf</a> Happy Holidays From P&A	Kristin Kliewer	12/14/2018 11:03 AM	P&A Miscellaneous	2018	939.7 KB
<input type="checkbox"/>		<a href="#">Privacy Policy.pdf</a> Privacy Policy 2018	Kristin Kliewer	07/16/2018 10:17 AM	P&A Miscellaneous	2018	59.5 KB

As is the case with any form of technology, the easier it is to access the more likely it is that you will utilize it. So, we also offer the P&A Portal via an App which can be found on the [App Store](#) or [Google Play](#).

If you have an interest in digging even deeper into the features available to you, members of the P&A Team would be more than happy to walk you through a virtual tour. Simply reach out to your Lead or Service Advisor.

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