

Introduction

The Planning Portal allows you to view data on your portfolio. Your Associate can configure and share any number of reports that you can access at your convenience using only an Internet connection and web browser. The Planning Portal doesn't replace the in-person meeting with your adviser, but it can create better communication between you and your Henssler Financial team.

When you sign in, you begin on the Dashboard. The Dashboard shows at-a-glance reporting information about your portfolio, as well as any announcements or new documents that have been posted for you.

You can customize the layout of the Dashboard reports to suit your liking. You can arrange the reports on your Dashboard, minimize or remove reports, or add additional reports.

Some common Dashboard reports include overall asset allocation and account holdings. Once you view the high-level Dashboard version of any report, you can open a full version that provides more detailed information. These full reports can be opened directly from the Dashboard or by navigating to the Reports page.

Asset Allocation

Holdings

Description	Quantity	Current Value	Accounts
Franklin Income Advantage (FRIAX)	40,094	2,756,884	3
Google Inc (GOOG)	3,214	1,287,271	1
Fidelity Select Chemical (FSCHX)	12,387	851,722	3
Lockheed Martin (LMT)	7,218	791,598	3
Apple Computer, Inc. (AAPL)	6,876	781,526	3
International Business Machines (IBM)	6,377	745,854	3
Fidelity Latin America (FLATX)	17,128	744,048	4
Stone Money Market (STIMXX)	656,603	656,603	4
Amazon Com Inc (AMZN)	8,599	625,663	3
Arheuser Busch Co Inc (BUSC)	8,009	584,504	3

To access the portal in the future, simply visit [Henssler.com](https://www.henssler.com), click "Portal" in the top menu and select "Planning Portal."

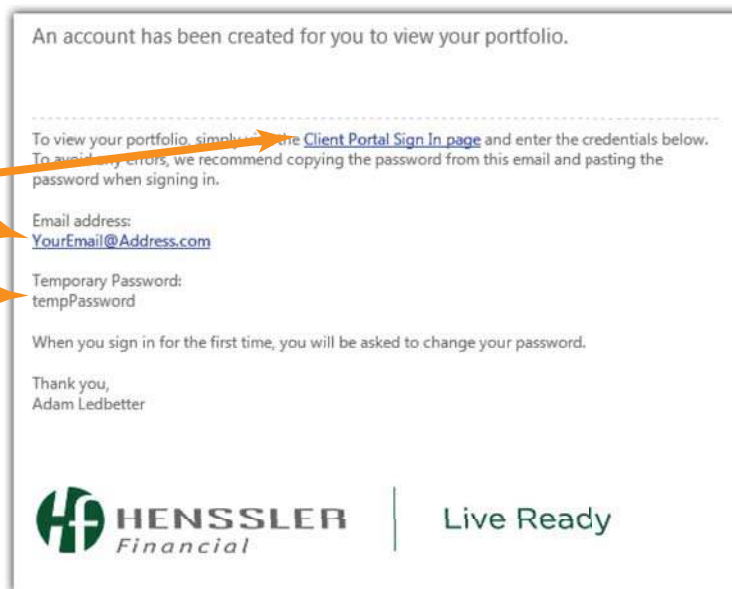
Signing in for the First Time

Activation Email

Once your Associate creates your Planning Portal, you will receive an email with instructions on how to sign in. The email will contain:

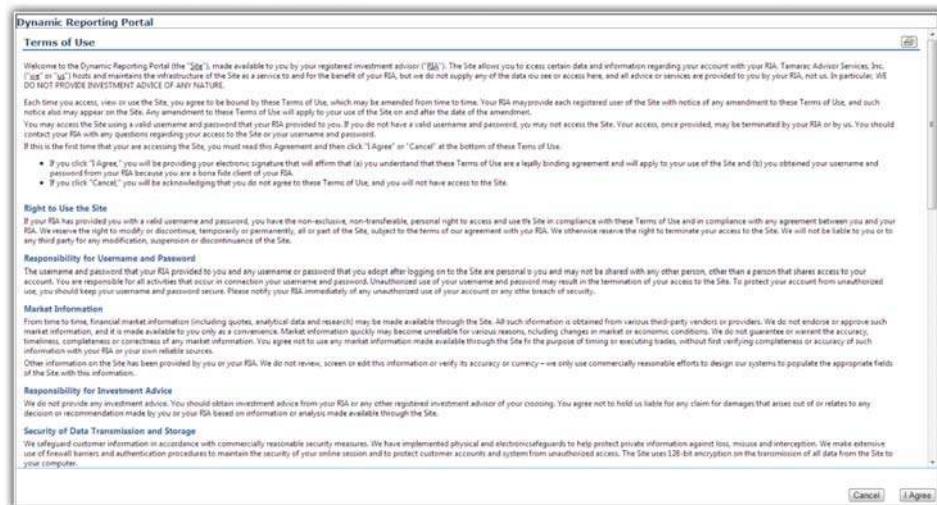
- A link to the Planning Portal Sign In page
- The email address that will act as the username
- A temporary password

Note: The email is sent from Tamarac, the company that developed the Planning Portal. If you do not receive this email within 24 hours, please check your junk mail folder. We suggest adding noreply@tamaracinc.com to your safe sender list to ensure you receive email notifications.



Agree to Terms

Once you receive the email, click the link for the Planning Portal Sign In page. Login with the email and temporary password located in that email. When you access your Planning Portal for the first time, you will be asked to accept the terms of use from Tamarac. Read the terms of the agreement, and then click the I Agree button. After agreeing to the terms, you will be required to change your password before you can continue.



Log Out

For additional security, we suggest logging out after every visit.