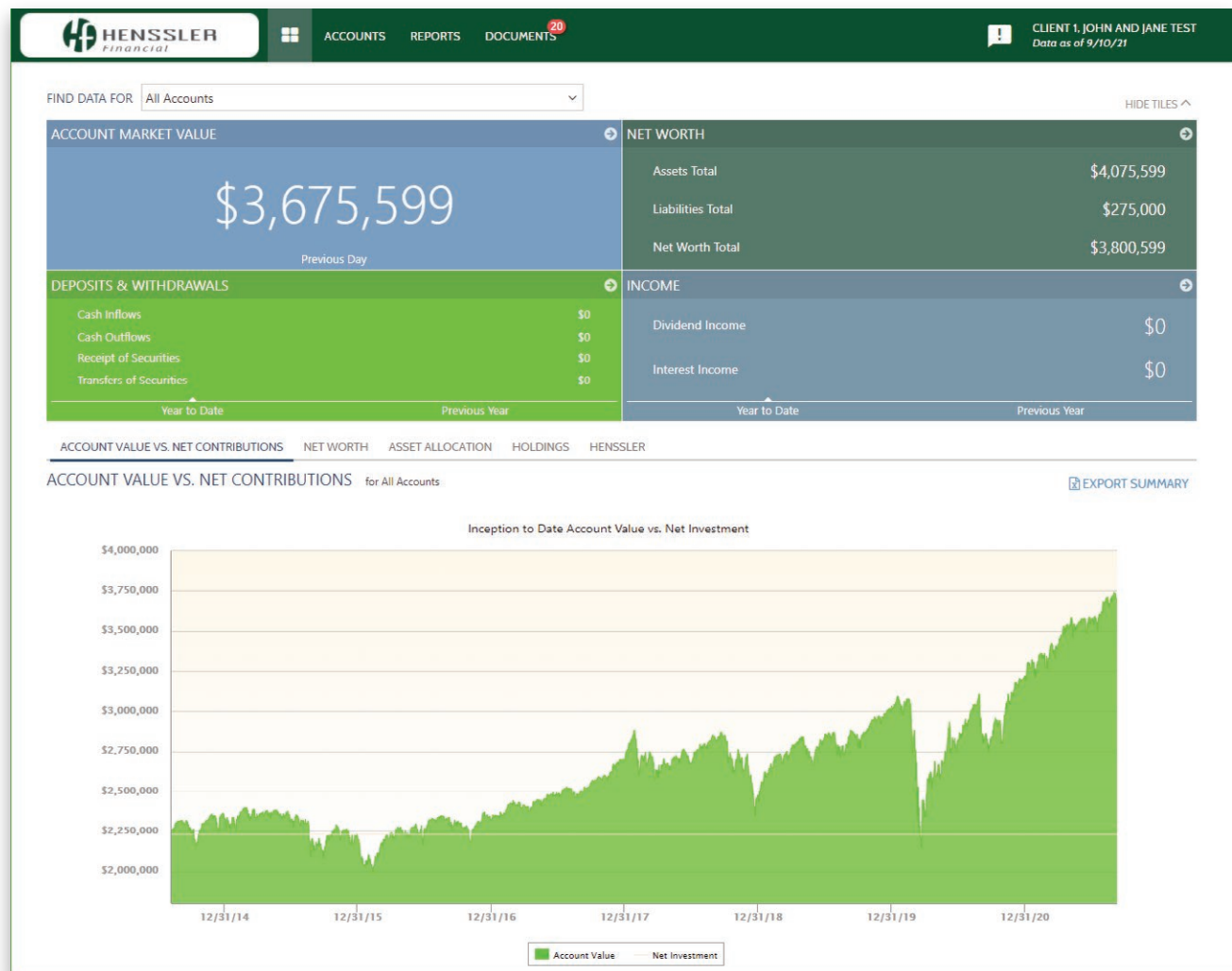


# Introduction

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 posted for you.

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.



To access the portal in the future, simply visit [Henssler.com](https://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 a new page to reset your password.

**Note:** The email comes from Henssler Financial ([noreply@investnet.com](mailto:noreply@investnet.com)). If you do not receive this email within 24 hours, please check your junk mail folder. We suggest adding [noreply@investnet.com](mailto:noreply@investnet.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 your 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.

The image displays three overlapping screenshots from the Henssler Financial Planning Portal. The top screenshot is a 'Welcome' email from Stefanie McKinney, stating that an account has been created and providing a link to 'Set New Password' which expires in 72 hours. The middle screenshot shows the 'SET PASSWORD' page, which includes fields for 'New Password' and 'Confirm Password', a 'SET PASSWORD' button, and a list of password requirements: passwords must not contain email address or parts of the full name exceeding two consecutive characters; must be at least 8 characters and contain characters from three of the following categories: uppercase letters (A-Z), lowercase letters (a-z), numbers (0-9), and non-alphanumeric characters (e.g., !, \$, %, etc.). The bottom screenshot shows the 'Dynamic Reporting Portal' 'Terms of Use' page, which includes a welcome message, a disclaimer, and sections for 'Right to Use the Site', 'Responsibility for Username and Password', 'Market Information', and 'Responsibility for Investment Advice'. At the bottom of the Terms of Use page are 'Cancel' and 'I Agree' buttons.