

NEW ONLINE PORTAL QUICK START GUIDE

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We are excited to share our new online portal with you! Below you will find instructions for accessing the portal:

ACCESSING THE PORTAL:

- Go to our website at www.jvlwealth.com
- Click on the "CLIENT CENTER" at the TOP RIGHT of the screen
- Login using your **EMAIL ADDRESS AS YOUR USERNAME**
- You will be prompted to enter a new password
- If you have any issues, please reach out to us



EXPLORING THE PORTAL:

Select between Overview (Position Data), Performance, or Activity (Transactions)

Change the date here

As Of 04/14/2021

VALUE ON 4/14/21
\$1,644,681

\$1,636,639 (Invested) | **\$8,043** (Cash)

Overview

GROUP BY Account | Asset Category | Asset Class

ALL ACCOUNTS
 \$1,644,681.38

MANAGED ACCOUNTS
 \$1,644,681.38

- *****1355 -IRA \$266,319.62
- *****1347 -IRA \$1,348,437.08
- *****5242 -Roth \$16,777.13
- *****7395 Family-Trust \$13,147.55

Click the triangles to drill down into further detail

Holding	Market Value	Units	Price	Percent
▶ Cash	\$8,042.63	--	--	0.49 %
▶ Fixed Income	\$503,010.04	--	--	30.58 %
▶ Equity	\$970,789.59	--	--	59.03 %
▶ Alternatives	\$150,662.53	--	--	9.16 %
▶ Allocation	\$12,176.59	--	--	0.74 %
	\$1,644,681.38			100.00 %

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FINDING YOUR QUARTERLY REPORTS:

- Click on the “DOCUMENTS” tab at the top of the page
- Click on “STATEMENTS”
- Then click “PORTFOLIO STATEMENTS”
- Reports from 3/31/2021 AND NEWER WILL BE SHOWN HERE

JVL WEALTH STRATEGIES

Portfolio Documents Statements Cloud Storage Admin Logout

CATEGORIES

PORTFOLIO STATEMENTS

Statements & Files
Select a file to download

New reports will be posted here

NAME	DESCRIPTION
2021 1Q Report	1/1/2021 to 3/31/2021

Firm disclosure documents are posted here

AVAILABLE DOWNLOADS

- Form CRS 2021.pdf
- Form ADV Part 2A 2021.pdf
- Form ADV Part 2B 2021.pdf
- Privacy Policy 2021.pdf

FINDING YOUR HISTORICAL QUARTERLY REPORTS:

- Click on the “DOCUMENTS” tab at the top of the page
- Click on “CLOUD STORAGE”
- Then click “1.0 PORTFOLIO REPORTS”
- Historical reports BEFORE 3/31/2021 WILL BE SHOWN HERE

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Cloud Storage
Download and upload files in the cloud

This link will show historical reports run before 3/31/2021

Refresh Add Folder Upload File(s)

AVAILABLE DOWNLOADS

- Form CRS 2021.pdf
- Form ADV Part 2A 2021.pdf
- Form ADV Part 2B 2021.pdf
- Privacy Policy 2021.pdf

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NAME	MODIFIED
1.0 Portfolio Reports	Feb 26, 2021 12:38:03 PM