



## How to Use your Client Portal iPad App

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## How to Download the App

1. Visit the Apple App store
2. Search for Advisor View Portal and Download the App

## How to Login

- For “Firm”, enter OpesAdvisors
- For “Username”, enter your email address
- For “Password”, use the same password you use to access your Client Portal.

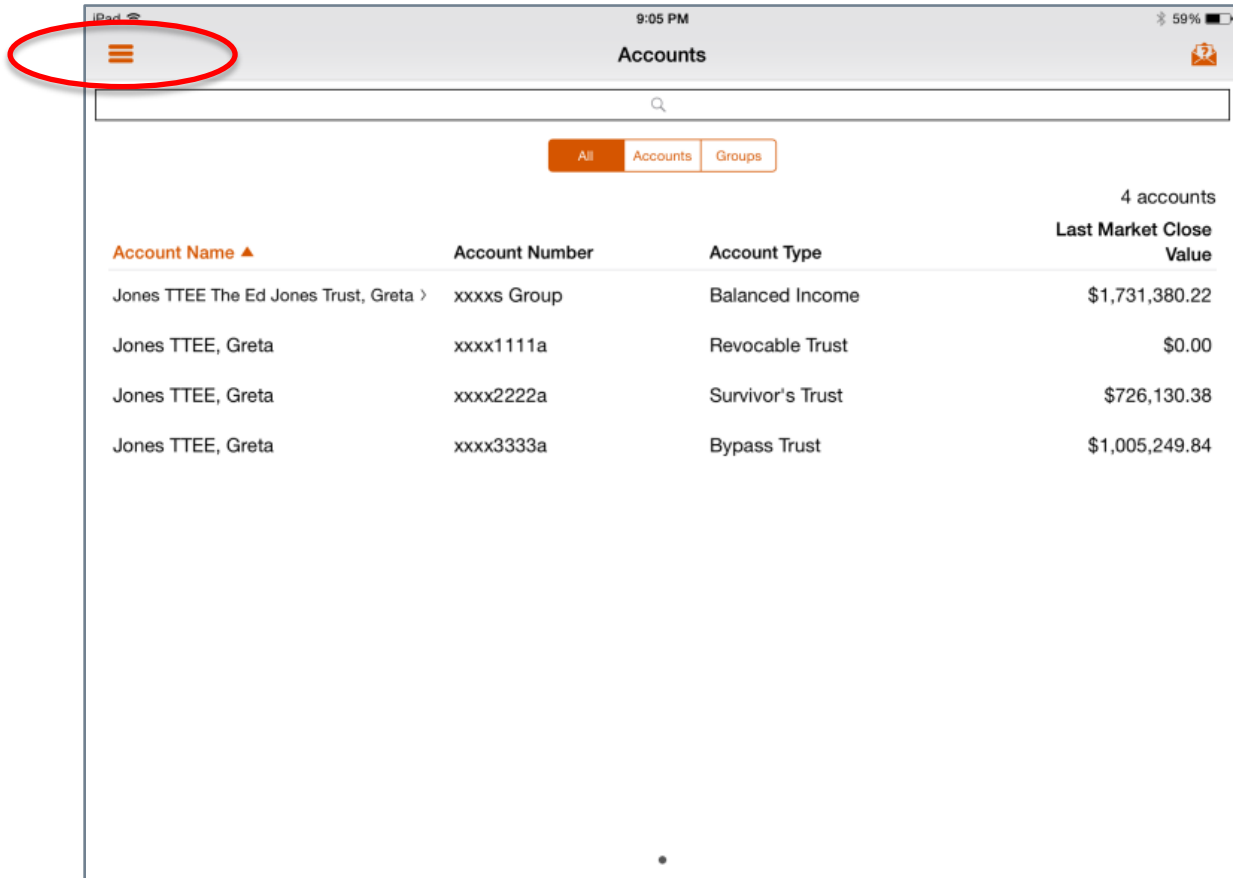
A screenshot of the Opes Advisors login interface on an iPad. The screen shows a light blue background with the "Opes Advisors" logo at the top. Below the logo are three input fields: "Firm" (containing "OpesAdvisors"), "Username – Email Address" (containing "osmith@gmail.com"), and "Password – same as Client Portal" (containing masked characters). A "Sign In" button is positioned below the password field. A "Remember me" toggle switch is located below the "Sign In" button. At the bottom of the screen, a virtual keyboard is visible, featuring a blue "Go" button.

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Once in the app, navigation is easy.

Just click on the orange “3 bars” under the iPad signal strength indicator, on the top left of the screen to see the menu and report options.

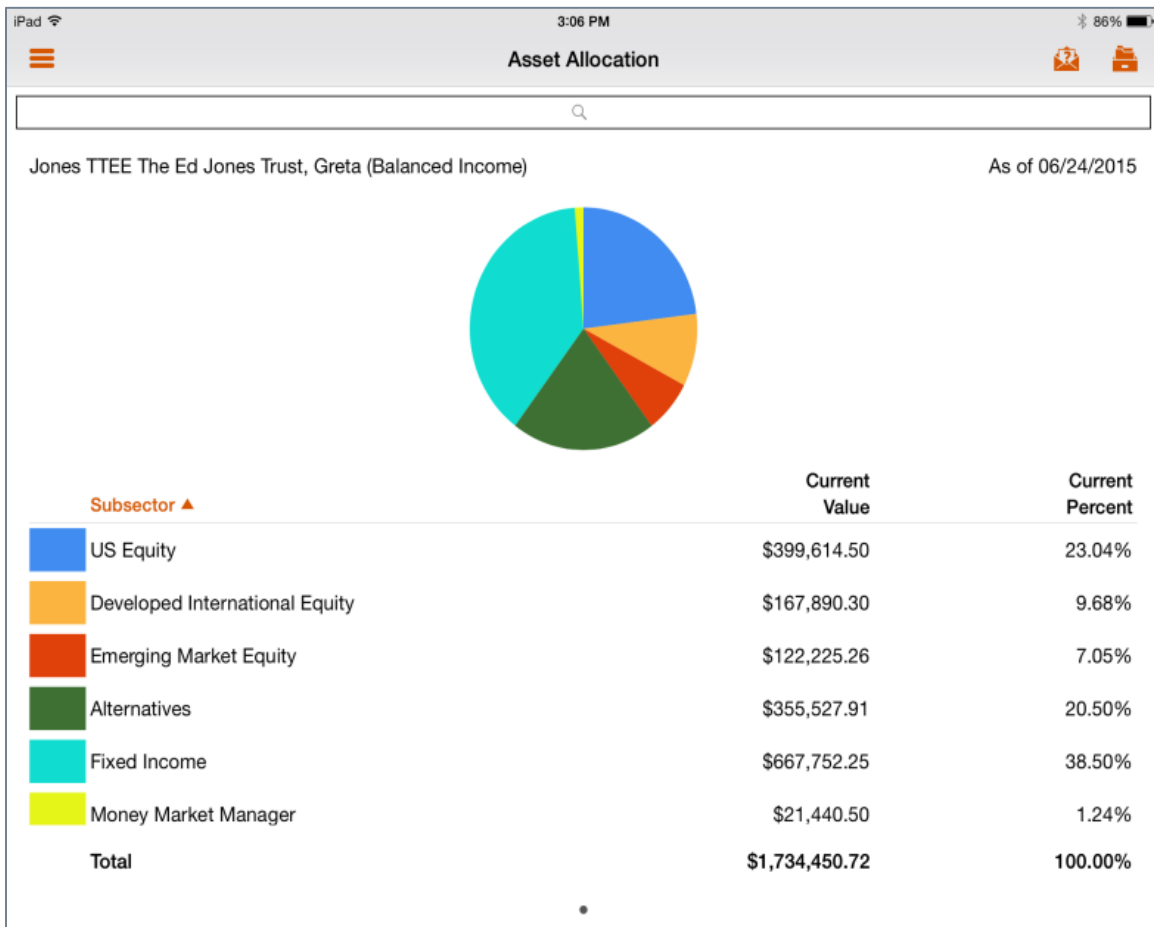


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This will bring up the list of available on demand reports, plus access to your Client Portal.

First is the **Asset Allocation Report**:



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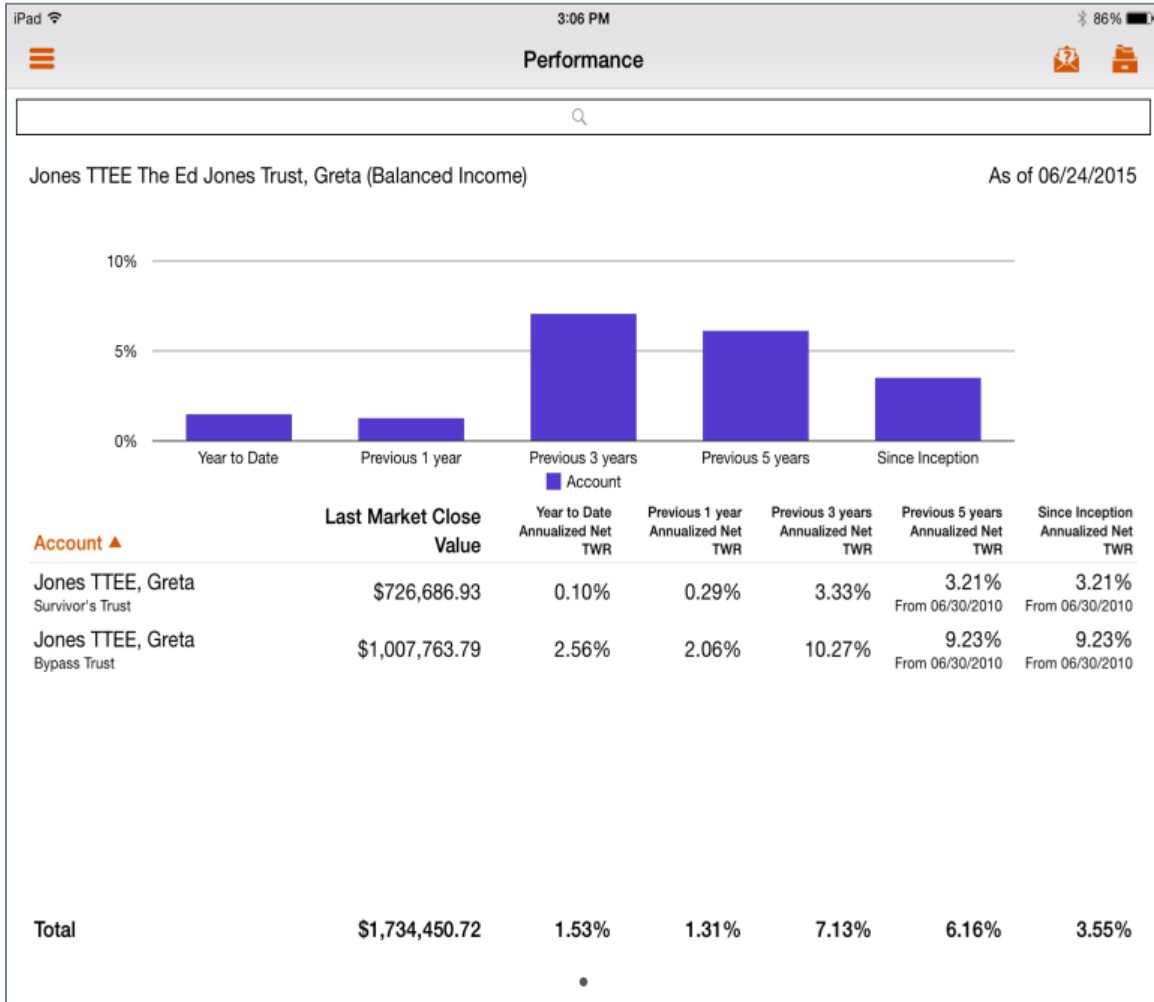
You can also view your **Holdings Report**:

Holdings					
Jones TTEE The Ed Jones Trust, Greta (Balanced Income) As of 06/24/2015					
Symbol	Description ▲	Quantity	Weight	Price	Value
ASAIX	Aqr Multi Strategy Alt >	5,555.556	3.16%	\$9.87	\$54,833.34
ARTGX	Artisan Global Value Fd >	4,310.635	4.00%	\$16.08	\$69,315.01
DODFX	Dodge & Cox Intl Stock >	1,178.552	3.08%	\$45.31	\$53,400.19
GSMMX	Goldman Sachs Multi Mgr >	7,877.960	5.01%	\$11.02	\$86,815.12
GSYIX	Goldman Sachs N 11 Eqty >	4,117.447	2.43%	\$10.22	\$42,080.31
GCMFX	Gurtin Ca Muni Value Fd >	29,541.833	17.00%	\$9.98	\$294,827.49
HFCIX	Hennessy Focus Fd I >	575.185	2.43%	\$73.17	\$42,086.29
IWF	Ishares - Russell 1000 Growth >	950.00	5.54%	\$101.23	\$96,168.50
IWD	Ishares - Russell 1000 Value >	550.00	3.34%	\$105.34	\$57,937.00
IJJ	Ishares S&P Midcap >	290.00	2.21%	\$132.29	\$38,364.13
JSOSX	Jpmorgan Strategic Incm >	10,198.208	6.89%	\$11.72	\$119,523.00
<b>Total</b>			<b>97.88%</b>		<b>\$1,697,723.97</b>

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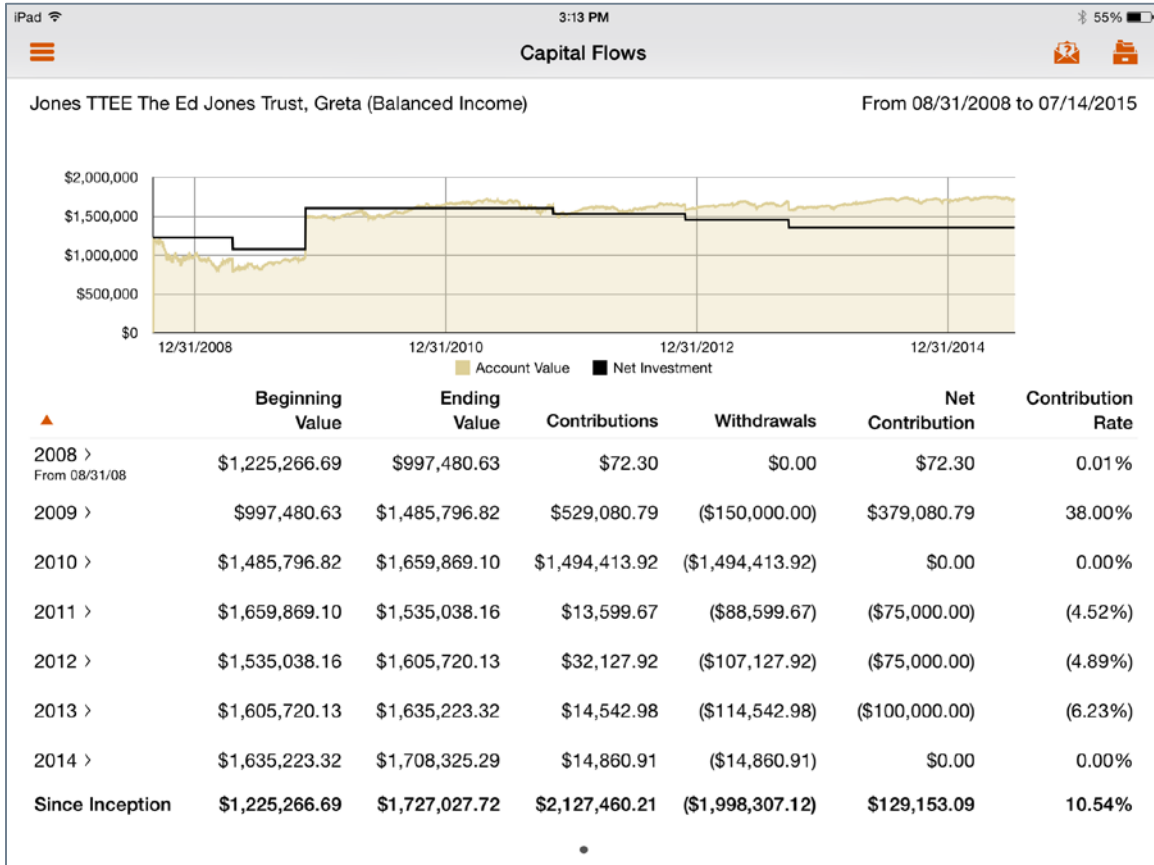
A **Performance Report** that shows each account and your total portfolio in different periods of time, including since inception:



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And, a **Capital Flows Report** that shows the value of your portfolio over time along with the contributions made into the portfolio.

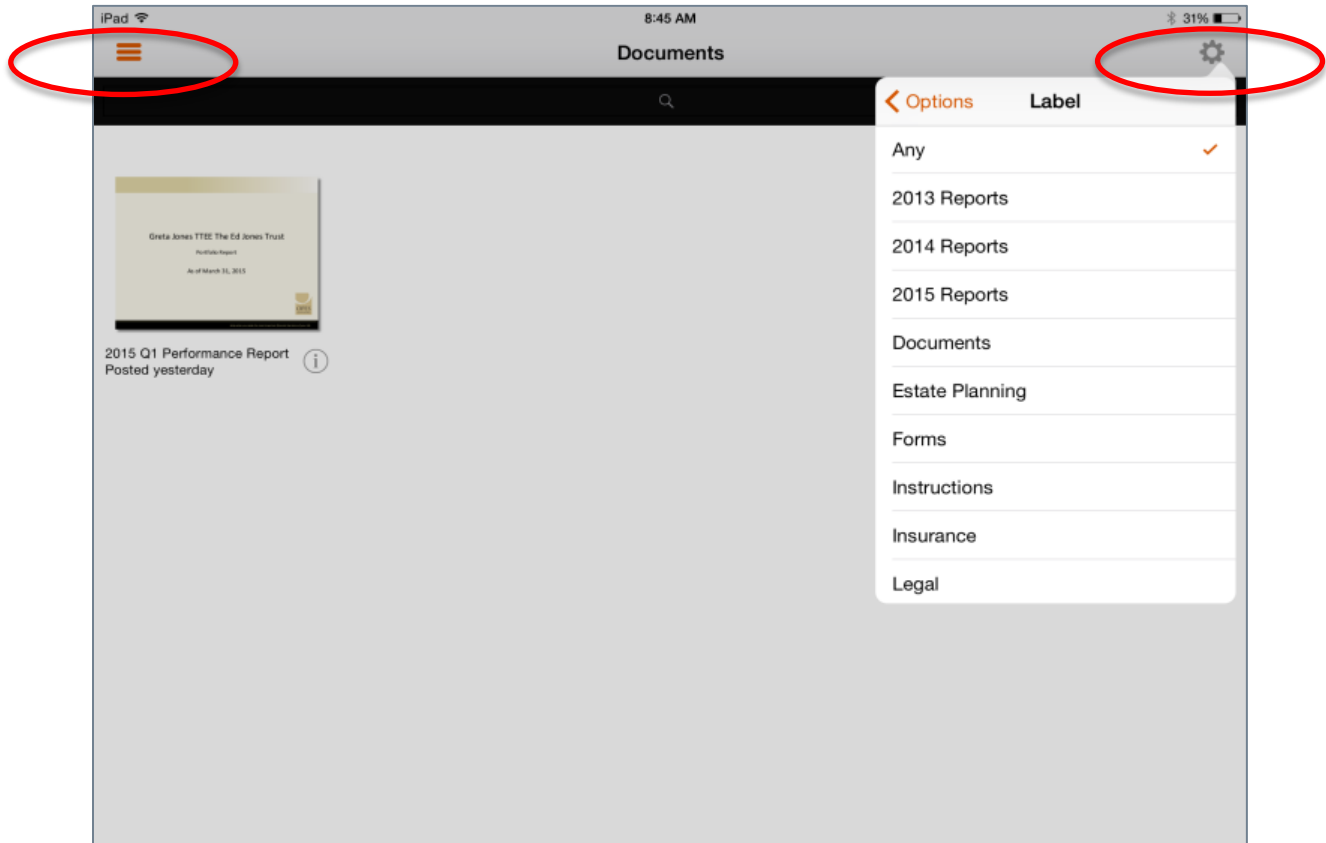


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You can also see your current and previous quarterly reports and the contents of your Client Portal.

From the menu, just choose **Documents**. To see a sorted view of your reports, click on the settings icon on the upper right and choose from the various categories.



If you have any problems setting up your iPad, entering your password, or accessing the reports, please give a call at 408-831-5806 or email me at [kbleicker@opesadvisors.com](mailto:kbleicker@opesadvisors.com).

Regards,

[Kenji Bleicker, CFP®](#)

Sr. Client Services Planner

408-831-5806

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