Getting Started with Yodlee®

A Modern Way to Monitor Your Wealth
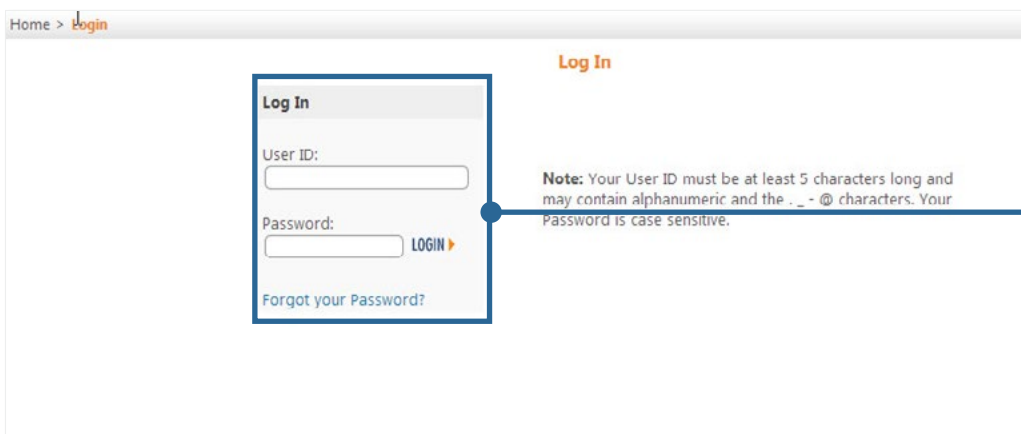
Aspire Advisors, LLC
Wealth Management

MoneyGuidePro®

Getting Started with Yodlee®

Your financial advisor has given you access to Yodlee, an industry-leading personal financial management tool used by many major financial institutions and millions of consumers. You can now start linking your financial accounts to get an accurate picture of your net worth and how the resources you have affect the success of your personal retirement plan. You'll see your whole financial picture: your resources, your liabilities, your net worth and how likely you are to reach your retirement goals. It will all be in one safe, secure place when you log in to your client portal. Your advisor won't see your user names or passwords, just the account totals and a bit of investment information. It means a more accurate, constantly updated financial picture, with less need for tracking down paper statements.
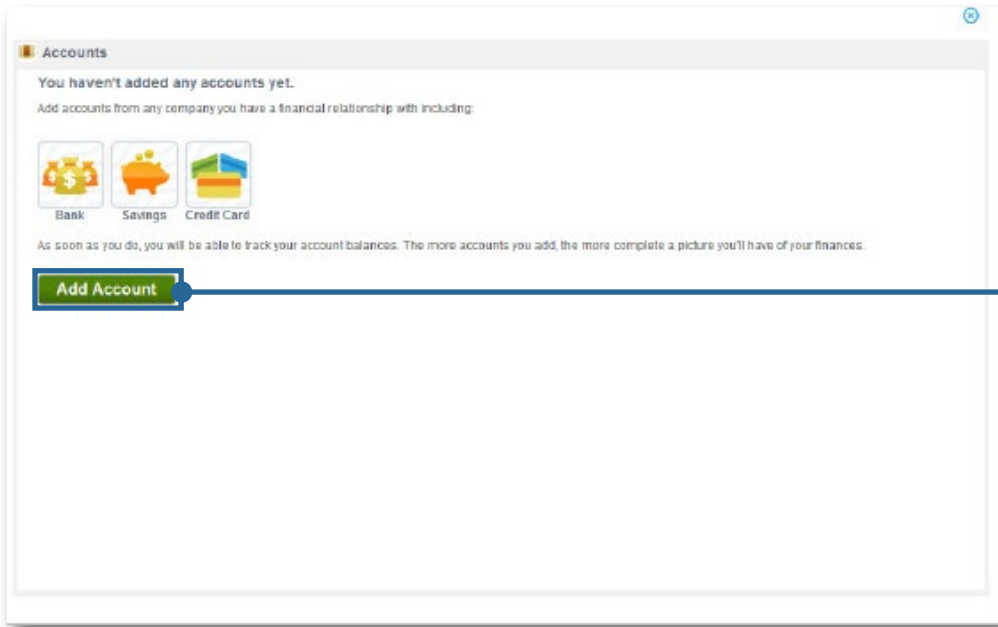
Here's how to get started:

Step 1
Log in to your Client Portal using the link and credentials supplied by your advisor.
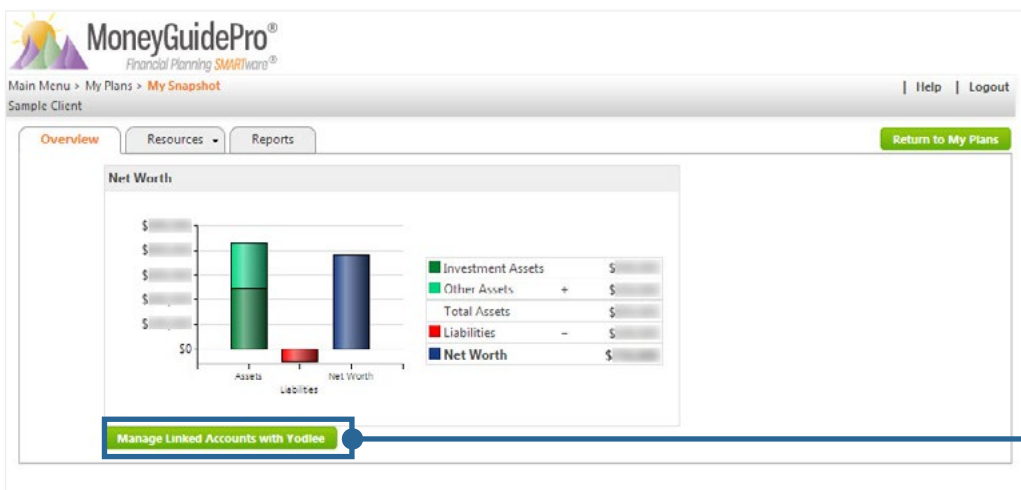
Step 2
From within My Snapshot, click on the **Manage Linked Accounts with Yodlee** button.
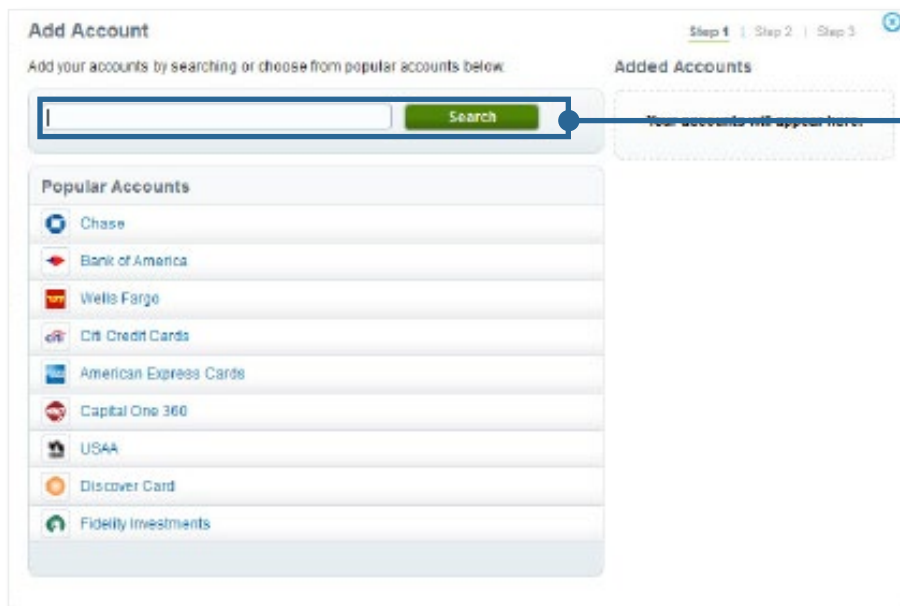
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Step 3
The Yodlee window will pop up. Select the **Add Account** button to immediately start linking online assets, liabilities and insurance policies.

Depending on the financial institutions you use, you may be able to add everything from checking and savings to brokerage accounts, credit cards, mutual funds, mortgages -- even your IRAs and qualified plan accounts, such as a 401(k). Keeping track of it all is easy when it's viewable in one safe, secure place.

Step 4
Search for the institution you want to link by name or web address and select it from the list.

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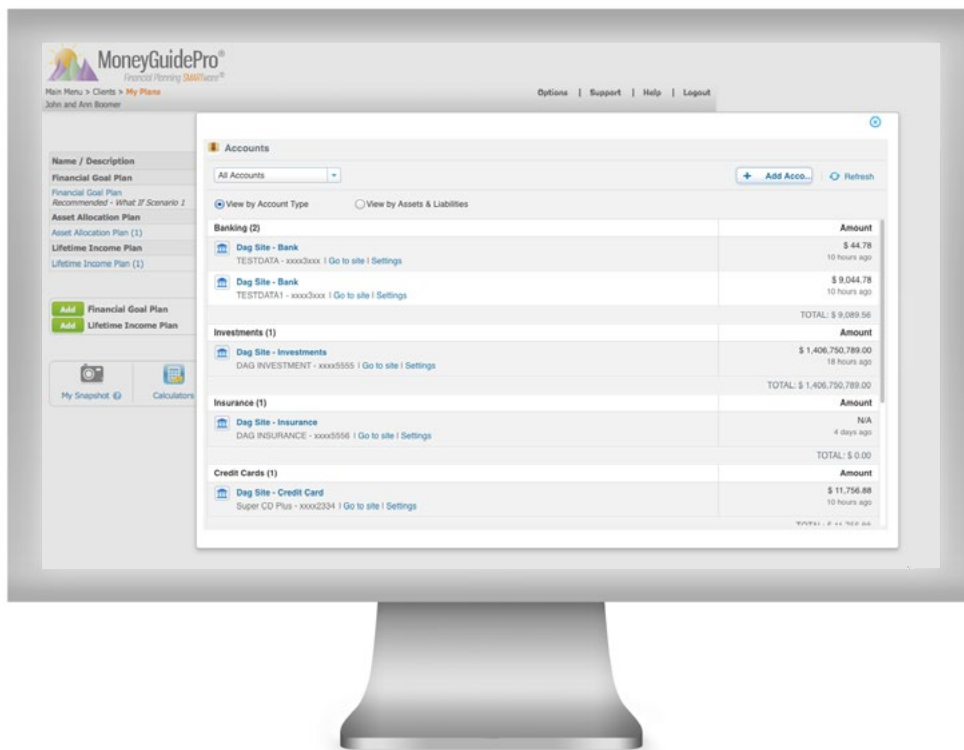
Step 5
Enter the same user credentials you use to log in directly to your financial institution's website and click **Add**.

Step 6
You are done linking the account! You can either click the **Add Account** button again to link additional online accounts, or you can click the blue "X" button in the top right of the window to exit and return to My Snapshot to view your updated Net Worth Statement.

If you have any questions about how to add an account, please contact your financial advisor.

Yodlee Data Aggregation Security: What You Need to Know

Yodlee Labs employs leading-edge technologies, standards, and business practices to protect your data. It owns multiple patents granted or filed on various aspects of technology including security infrastructure and data acquisition framework.

Key components of Yodlee security include:

- Data and Password Encryption
- Network Intrusion Detection Systems
- Physical Security Measures
- Rigorous Audits and Inspections
- Frequently Asked Questions

Yodlee Labs employs Thawte certificates for this service, and is recognized as a VeriSign Secure Site.

Data and Password Encryption

Password and account data are stored and transmitted in encrypted format at all times. All data is securely housed in an Internet server hosting space that provides enhanced physical security, fire protection and electronic shielding.

Network Intrusion Detection Systems

Network-based IDS (intrusion detection system) provides 24x7 network monitoring and alerts security personnel to any external attacks on the network.

Physical Security Measures

Yodlee Labs has retained the most secure environment available at a third-party site. Security personnel monitor the system 7 days a week, 24 hours a day. Access to servers requires multiple levels of authentication, including biometrics (hand print scan) procedures.

Rigorous Audits and Inspections

The security infrastructure is regularly audited and inspected by industry-leading third party auditors and security experts.

Frequently Asked Questions

Q. How do you protect my account passwords and user IDs?
A. Your personal information is entered through Secure Socket Layer (SSL), which creates an encrypted connection between your browser and Yodlee's servers. This information is kept encrypted at all times.

Q.Who has access to my Yodlee Labs account?
A.You create, and only you know your Yodlee password. Aspire Advisors has the ability access account information for purposes of building your financial plan. No person or entity other than Aspire Advisors can access your account unless you provide him or her with this information. No Yodlee employees have access to your password.

Q. How is my account information protected during transmission?
A. The transmission of data is protected using industry recognized encryption standards, such as 128-bit. Users' passwords are transmitted and stored in encrypted format at all times.

Q.Where is my account information stored?
A.Your information is stored on servers, which are securely housed in an Internet server hosting space that provides enhanced physical security, fire protection and electronic shielding. Security personnel monitor the system 24 hours a day, 7 days a week. Access to servers requires multiple levels of authentication, including biometric (hand print scan) procedures.

Q. How is my account information protected from "Hackers" or outside intrusion?
A. Network-based intrusion detection systems (IDS) provide 24x7 network monitoring and alerts Yodlee to any external attempts to access the network. In addition, multiple layers of firewalls are used to guard against unauthorized access to the network.

Q. How frequently do you evaluate your security systems?
A. The security infrastructure is regularly audited or inspected by firms that specialize in security processes and technologies, including frequent audits of network and security policies and procedures by industry recognized IT security auditors.

Q. Is my data secure during a "service outage" or "scheduled maintenance"?
A. In the unlikely event that the service is temporarily unavailable, your account information remains secure in Yodlee's Internet server hosting space, which is protected by stringent Network-based and physical security measures.

Q. Is my personal identity protected?
A. Yodlee will not sell or share your data with anyone unless requested by you through the opt-in feature of the service. Yodlee's Privacy Policy describes, in detail, how they will protect your personal privacy and keep your personal information secure.