FINANCIAL JOURNEY PARTNERS

EFFICIENT USE OF THE CLIENT PORTAL

Topics covered will include:

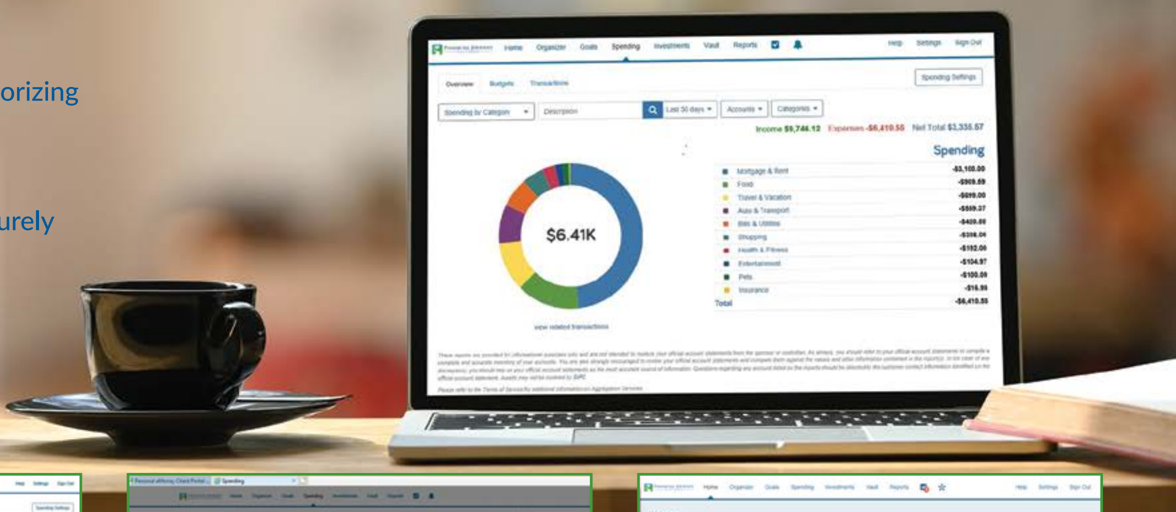
Budgeting

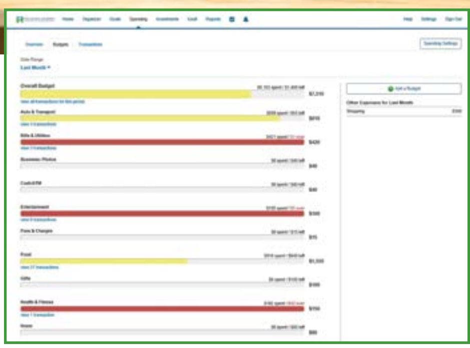
- Adding subcategories
- Creating rules for categorizing transactions

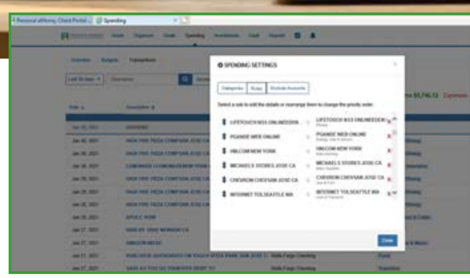
Vault

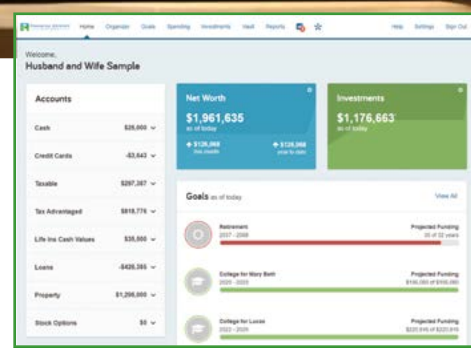
- Sharing documents securely with your Tax Preparer and Estate Attorney
- Using the Help Feature

Your Questions









Test your Client Portal access before the day of training.

Email your questions in advance to arielle@financialjourney.com.

THURSDAY, MARCH 11, 2021
1pm Pacific – Webinar

CLICK OR SCAN TO REGISTER

financialjourney.com/portal

If you need assistance registering, contact **Arielle** at **arielle@financialjourney.com** or **408.963.2889**

Elaine Manley, Financial Advisor, *elaine@financialjourney.com*
Scott Manley, Financial Advisor, *scott@financialjourney.com*
Linda Tjiputra, Financial Advisor, *linda@financialjourney.com*
www.financialjourney.com