

Client View Live November 2009

Login Screen

The screenshot shows a Windows Internet Explorer browser window titled "User Log In - Windows Internet Explorer". The address bar contains the URL: <http://www.junxureclientview.com/12754/Home/tabid/2244/ctl/Login/Default.aspx?returnurl=%2f12754%2fHome%2ftabid%2f2244%2fDefault.aspx>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The Favorites bar shows "User Log In". The main content area features the SILVERSAGE logo with the tagline "Enduring Financial Wisdom" and a "Login" link. The date "Friday, November 13, 2009" is displayed. Below a purple decorative bar, the breadcrumb "You are here: Home" is shown. The "User Log In" section contains a "User Name:" field, a "Password:" field, a "Login" button, and a "Forgot Password ?" link. At the bottom, a footer contains the text "Copyright 2008 by CRM Software | Privacy Statement | Terms Of Use". The browser's status bar at the bottom shows "Done", "Internet", and "110%".

User Log In - Windows Internet Explorer

http://www.junxureclientview.com/12754/Home/tabid/2244/ctl/Login/Default.aspx?returnurl=%2f12754%2fHome%2ftabid%2f2244%2fDefault.aspx

File Edit View Favorites Tools Help

CV User Log In

SILVERSAGE

Enduring Financial Wisdom

Login

Friday, November 13, 2009

You are here: Home

User Log In

User Name:

Password:

Login

[Forgot Password ?](#)

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Done Internet 110%

Home Screen

The screenshot shows a web browser window titled "Silversage Advisors > Home - Windows Internet Explorer". The address bar contains the URL "http://www.junxureclientview.com/12754/Home/tabid/2244/Default.aspx". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The page header features the "SILVERSAGE" logo with the tagline "Enduring Financial Wisdom". In the top right corner, the user is identified as "John Sample" with a "Logout" link, and the date is "Friday, November 13, 2009". A navigation menu below the header includes links for "Home", "Accounts", "Insurance", "Document Vault", "Portfolio Reports", "Live Reports", and "Contact Us". The main content area starts with "You are here: Home" and a "Refresh Data" button indicating the last refresh was on "11/13/2009 2:44:30 PM EDT". The central heading is "John and Jane Sample".

News

- Deficit doubles for government pension insurer (AP)
- Realtors: home prices to rise 4 percent in 2010 (AP)
- J.C. Penney reports sharp drop in 3Q profit (AP)

Announcements

- Password Safe - Wednesday, November 11, 2009**
Password Safe
read more ...
- Welcome to your Silversage Client Console! - Tuesday, November 10, 2009**

My Alerts

Contact Info

Phone Numbers

- (888) 555-1212*

Mailing Addresses

- 123 Main Street
Town, CA 99999*
- 456 Second Street
Second Town, CA 99999

Email Addresses

- jsample@email.com*
- jsample2@email.com

Your contact information is on this screen, and the italicized information in the "Contact Info" screen denotes primary preferences. Generic announcements to all clients are found under "Announcements", and communication specific to you is found under "My Alerts".

Accounts Screen

Accounts - Windows Internet Explorer
 http://www.junxureclientview.com/12754/Accounts/tabid/2246/Default.aspx

Enduring Financial Wisdom

Home Accounts Insurance Document Vault Portfolio Reports Live Reports Contact Us

You are here: Accounts

Refresh Data
Last: 11/13/2009 2:44:30 PM EDT

Assets By Account

| Account Number | Description | Type | Status | Market Value | Liability | Net Value |
|----------------|-------------|------|----------|---------------|-----------|---------------|
| ACZ999999 | John Sample | IRA | Advisory | \$ 131,820.00 | \$ 0.00 | \$ 131,820.00 |

Cash & Equivalents (000)

| Asset Name | Value | Shares | As Of | Cost Basis | Type | News |
|-------------|---------------|--------|------------|---------------|----------------------|------|
| CASH (CASH) | \$ 100,000.00 | 100000 | 11/13/2009 | \$ 100,000.00 | Cash and Money Funds | Y G |

Stock, Large Cap Blend (064)

| Asset Name | Value | Shares | As Of | Cost Basis | Type | News |
|--------------------------------------|--------------|--------|------------|--------------|--------------|------|
| Amer Funds Fundamental Inv F (AFIFX) | \$ 31,820.00 | 1000 | 11/13/2009 | \$ 15,000.00 | Mutual Funds | Y G |


\$ 131,820.00 \$ 0.00 \$ 131,820.00


This screen shows the list of your accounts. If you click on the folder next to the account number the positions appear in that account.

Insurance Screen

The screenshot shows a web browser window with the following elements:

- Browser Title:** Insurance - Windows Internet Explorer
- Address Bar:** http://www.junxureclientview.com/12754/Insurance/tabid/2247/Default.aspx
- Navigation Menu:** Home, Accounts, Insurance, Document Vault, Portfolio Reports, Live Reports, Contact Us
- User Information:** John Sample, Logout, Friday, November 13, 2009
- Breadcrumb:** You are here: Insurance
- Refresh Data:** Refresh Data (Last: 11/13/2009 2:44:30 PM EDT)
- Table of Policies:**



| Policy Number | Policy Type | PlanType | Company | Owner | Insured |
|---|-------------|----------|---------|--------|---------|
|  AIG1234 | L | LI | AIG | Client | Client |
- Policy Details (for AIG1234):**

| | |
|-----------------|--|
| Plan Type | LI |
| Premium | \$ 10,000.00 |
| Beneficiary | Spouse |
| Cash Value | \$ 25,000.00 |
| Plan Name | AIG Whole Life |
| Policy Document |  View File |
- Footer:** Copyright 2008 by CRM Software | Privacy Statement | Terms Of Use

This screen shows the list of your current insurance coverage. If you click on the folder next to the policy number, the policy information appears. If you click on the “View File”, an actual copy of your policy will open.

Document Vault

The screenshot shows a Windows Internet Explorer browser window displaying the Document Vault page. The address bar shows the URL: <http://www.junxureclientview.com/12754/DocumentVault/tabid/2246/Default.aspx>. The page features the SilverSage logo with the tagline "Enduring Financial Wisdom". A navigation menu includes Home, Accounts, Insurance, Document Vault, Portfolio Reports, Live Reports, and Contact Us. The "Document Vault" section is active, showing a list of documents:

- Estate Planning**
 -  **Trust Document** - Size: 6.7 KB
- Insurance**
 -  **John's Policy** - Size: 6.6 KB

At the bottom of the page, there is a footer with the text: "Copyright 2008 by CRM Software | Privacy Statement | Terms Of Use".

This screen shows the list of the documents that have been put into your vault. If you click on the red and white box next to the title of the document, the document will open. Anything can be put in your vault, but here is a sample of frequently “vaulted” items:

- ” Financial Plans
- ” Insurance Policies
- ” Trust Documents
- ” Wills
- ” Power of Attorneys
- ” Tax Returns
- ” Medical Directives
- ” Passport Copies
- ” Birth Certificates

Portfolio Reports

The screenshot shows a Windows Internet Explorer browser window displaying the 'Portfolio Reports' page for 'John Sample IRA'. The browser's address bar shows the URL: <http://www.junxureclentview.com/12754/PortfolioReports/tabid/2249/Default.aspx>. The page features the 'SILVERSAGE' logo with the tagline 'Enduring Financial Wisdom'. A navigation menu includes links for Home, Accounts, Insurance, Document Vault, Portfolio Reports, Live Reports, and Contact Us. The breadcrumb trail indicates the user is in the 'Portfolio Reports' section. A 'Refresh Data' button is visible, with a timestamp of 'Last: 11/13/2009 2:44:30 PM EDT'. The main content area displays a report titled '2009 2Q' with a red and white icon. The footer contains copyright information: 'Copyright 2008 by CRM Software | Privacy Statement | Terms Of Use'.

This screen shows the list of account reports that have ready for your viewing. If you click on the red and white box next to the title of the report, your report will open.

Live Reports

Live Reports - Windows Internet Explorer

http://www.junxureclientview.com/12754/LiveReports/tabid/2250/Default.aspx

File Edit View Favorites Tools Help

CV Live Reports

SILVER SAGE

Enduring Financial Wisdom

John Sample Logout

Friday, November 13, 2009

Home Accounts Insurance Document Vault Portfolio Reports Live Reports Contact Us

You are here: Live Reports

Refresh Data
Last: 11/13/2009 2:44:30 PM EDT

- Estate Planning
 - Beneficiary Report As of: 11/13/2009
- Financial
 - Client Accounts With Totals As of: 11/13/2009
 - Assets And Liabilities By Account As of: 11/13/2009
 - Asset Ownership As of: 11/13/2009
- Goals
 - Goals As of: 11/13/2009
- Important
 - Associates Report As of: 11/13/2009
- Insurance
 - Insurance Summary As of: 11/13/2009
 - Life Detail As of: 11/13/2009

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This screen shows all of the reports that are available for you to view. If you click on the red and white box next to the title of the report, the report will open.

Contact Us

Contact Us - Windows Internet Explorer

CV LIVE https://www.junxureclientview.com/12754/ContactUs/tabid/2252/Default.aspx?dnprintmode=tru

ContactUs

Message:

Attach File(s):

Send To:

Done Internet 110%

This screen shows the box that opens up when you click on “Contact Us” from the main screen. You can send a message to anyone in our office. This screen also allows you to upload documents for us to view or deposit into your vault.