

WealthVision FAQ's

What is WealthVision?

WealthVision is a program that will bring all of your Investments and Assets together into one place. WealthVision interfaces with: Bank Accounts, 401ks, IRA, Pensions, Trusts, Life Insurance, SEPs, Stocks, 529 Plans, Annuities, Mortgages, and much more. Rather than login to multiple investment sites you will have all your information, numbers, and net worth in one place for your convenience! Wealth vision (using your retirement wishes) will also be able to show how your assets will last throughout your retirement.

How safe is this program?

WealthVision is driven by EMoney. This program is non-transactional, providing the peace of mind that even with all of your information in one place, it cannot be altered. EMoney's hosting infrastructure has been designed with the highest level of security and backup disaster recovery to protect your information, EMoney employs a multi-layered Internet Security technology with the latest intrusion prevention technology. EMoney ensures that credentials submitted into the system are classified as Super Sensitive information and that all data, including Client User IDs, and third party usernames, pins and passwords, and all of the third-party customer information is always transmitted in 128-bit encrypted format.

For more detailed information you can watch EMoney's security video at
http://www.emoneyadvisor.com/emacorp/ema/advisorplatform/Security_web.htm

What is the difference between WealthVision and Client Portal?

Many people ask this question a lot because both names are used quite frequently and can easily be seen as the same thing. WealthVision is the program that you are signing up for; it is the program that links all of your accounts to one place. Client Portal is the sub program that you use to login to WealthVision. The Client Portal is the place that you go to log in, and WealthVision is the place that login takes you too. I know it can be confusing so if you have questions please feel free to call the main office.

How do you set up your Client Portal?

Once you decide you would like to use WealthVision an email allowing you access will be sent to you. This email will allow you to create your log in credentials. For security reasons the email is not from Ryan but from WealthVision making it a software generated email, thus the information inside is not very helpful. However, in the center of the email will be a hyperlink to take you to a secure website from which you can create your password and user ID. **This link/email is only good once.**

Why won't the login page accept my password?

When you are first creating your password, for security reasons, it must consist of at least 8 characters, one of which must be a number. If at any time you wish to change your password, at the bottom right hand corner of the login page is a link to request a new password. This will send the request to Ryan who then will reissue the access email with a new hyperlink. Within 24 hours you will receive a new access email.

I can't get into my Client Portal through the email you sent me what's wrong?

The link in the email that I sent you is only good once. After this, WealthVision will no longer accept it to be safe that someone is not using it to change your password. To access your client portal anytime after the original set up you can either go to http://www.peakcapital.com/client_center.htm and click on the "WealthVision Client Portal (Clients ONLY)" or you can go to <https://clientportal.lpl.com>.

When I first log in it says "no records found." Why is that?

After you first sign in if you look near the top on the left there should be three tabs that read left to right- account view, IDoc, WealthVision. Clicking on WealthVision will take you to where you can view your accounts and assets. When you first log in you are in the "account view" tab; this will be the first page you will see every time you login to WealthVision. You aren't going to be using "account view" the only thing it is good for is for the market values chart on the right. So go ahead and click on the WealthVision Tab to be redirected to your accounts.

Can I change the information in my profile?

No, but feel free to explore and roam around the program, the information is entered from our side so it removes the worry of accidentally changing anything while you are first learning how to use the program. If there is any information that is incorrect contact Ryan and ryan.beck@peakcapital.com and he will make the appropriate changes.

How can I add any outside account I have into my WealthVision to be viewed and updated daily?

The easiest way is from your welcome page in WealthVision. In the blue "Get Started Now" box click on "connect to your financial accounts." Then you will want to type in the name of the company name that your account is through into the provided box next to where it says "Institutes' name contains." Click find. WealthVision will then pull up a list of companies that contain the name. Clicking on the provided names will show underneath what the web site to that institute is.

Example: If I type in Chase to pull over my checking account, the search will bring up Chase mortgage, Chase student loan servicing, Chase Bank, Chase credit cards. If I click on Chase Bank, underneath of the list it will say where that website is. It is important to click on the link so that it will come up for you to make sure this is the right website, the one I normally sign into to see my checking account.

It is so with your institutes' name highlighted select "choose." It will then ask you to log in. Log in to this page as you would normally do at your institutes' web page. Click "save."

Why am I not about to see my account I just linked?

Although WealthVision is highly advanced, it is not able to categorize an account on its own because it can have hundreds of kinds of accounts capable of being pulled into it. So before it allows you to see the account you just added, it will send me a alert asking me look at the kind of account it is and properly categorize it, whether it is a IRA, 401k, etc. As soon as it is categorized it is available to view. We do ask that you give us a full business day to acknowledge and categorize the account.

Why are my accounts frozen on the weekend?

WealthVision is based around the market, and because the market is closed on weekends the information is not able to be pulled over so WealthVision defaults to the last know close-Friday.

The market was down yesterday but up today and yet my balances show a decrease, why is that?

This is because WealthVision is 24 hours behind; it is a reflection the information from the day the accounts were down. WealthVision pulls the information from the institutes anywhere from 6 pm to 2 am after the market closes, because the institutes are generally reflecting the prior day closing.

What do I do if I need help?

If you are a client of David Petersons you can either call the office at (303) 972-7786 and ask for Ryan Beck, or you can email Ryan at ryan.beck@peakcapital.com

If you are a client of Brandon Ross or Jonathan Blumenthal you can either call the office at (972) 409-0885 and ask for Ben Stone, or you can email Ben at ben.stone@peakcapital.com