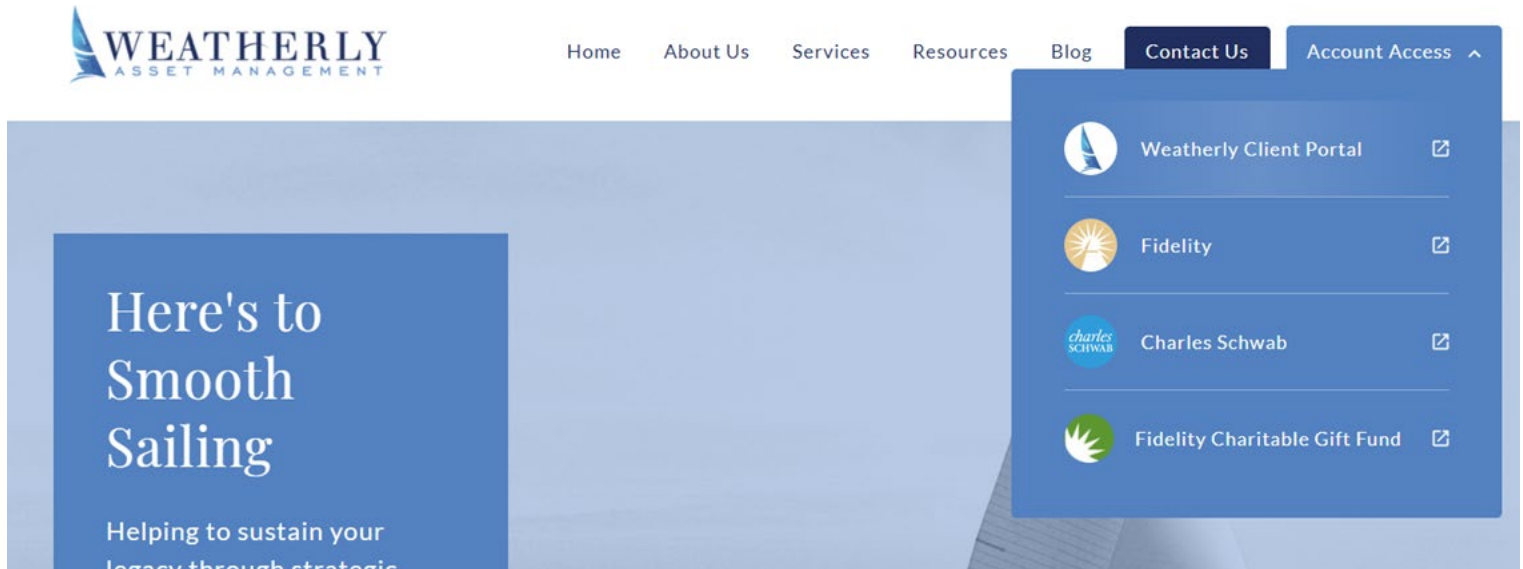


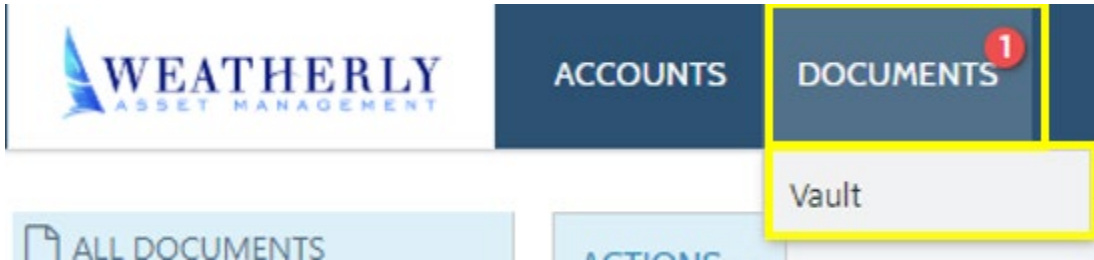
How to get to the Weatherly Portal

You can navigate to the Weatherly Portal by going to our website, <https://www.weatherlyassetmgt.com/>, hovering over Account Access, and clicking “Weatherly Client Portal”.

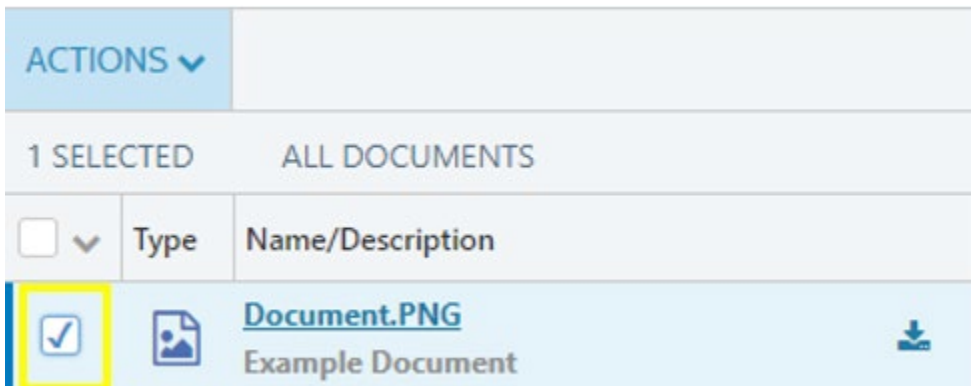



Downloading Documents from the Weatherly Portal

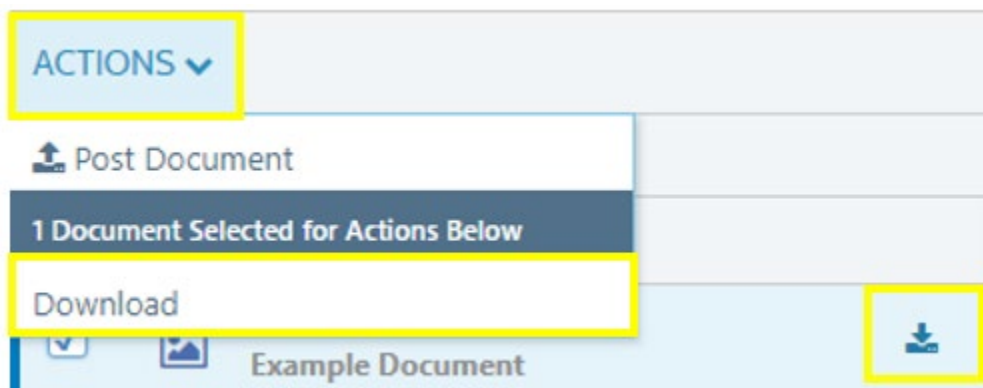
1. Hover over the “Documents” tab on the top ribbon.
 - a. Select the drop down “Vault”



2. Select the check box next to the document(s) you wish to download.

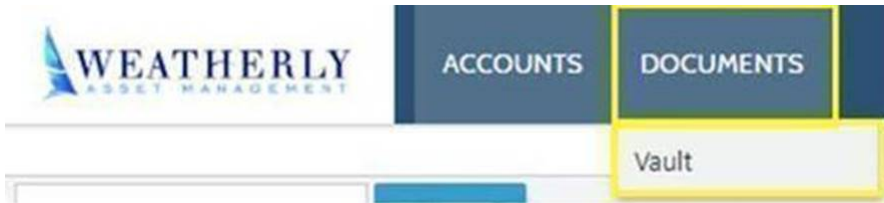


3. Select the “Actions” tab.
 - a. Select the drop down “Download”
 - b. Alternatively, documents can be download by clicking on the download icon ()

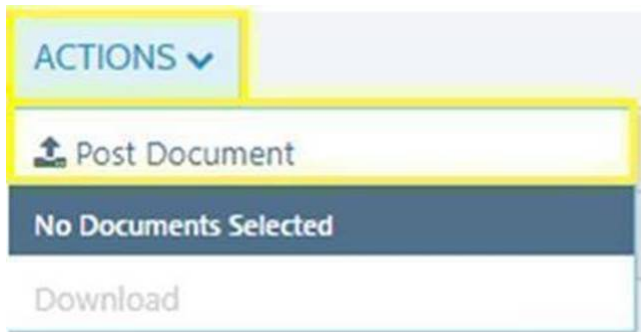


Uploading Documents to the Weatherly Portal

1. Hover over the “Documents” tab on the top ribbon.
 - a. Select the drop down “Vault”.



2. Select the “Actions” tab
 - a. Select the drop down “Post Document”



3. Click “SELECT OR DROP FILES HERE...”
 - a. This will allow you to search your computer for the document(s) you wish to post
4. Click “Post” once complete.

