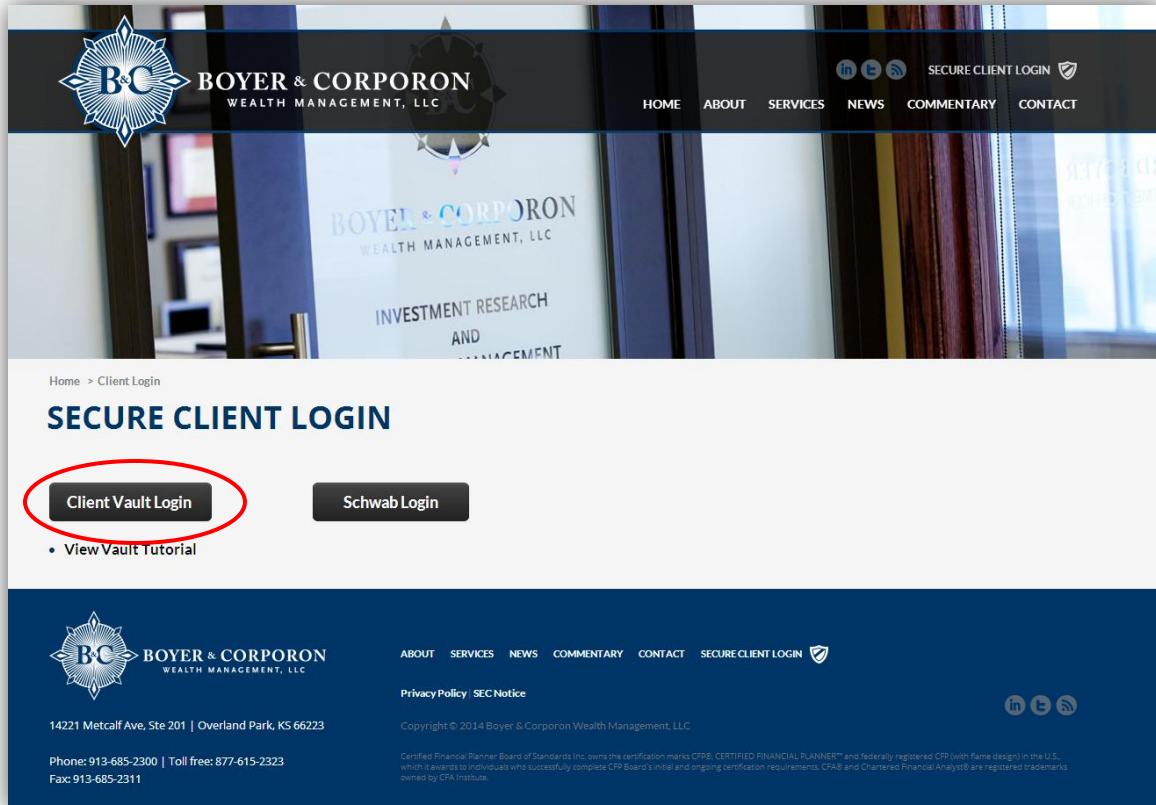




Personal Client Vault Tutorial

- 1) Click the “Client Vault Login” button from the Secure Client Login section of the BCWM website.



- 2) Enter your username and password, and click the “Login” button. **Passwords are case-sensitive!**



Personal Client Vault Tutorial
Boyer & Corporon Wealth Management

➤ This is your Personal Vault Homepage.

1. News: Live streaming of financial news updates from Yahoo! Finance
2. Announcements: Important announcements from BCWM will be posted periodically
3. My Alerts: History of your contact with BCWM through your Vault
4. Refresh Data: Updates page with recently published data
5. Logout: Click to Log-out of your Personal Vault
6. Document Vault: Click to go to your Document Vault (see description below)
7. Contact Us: Click to contact BCWM through your Vault (see description below)

The screenshot displays the Personal Client Vault Homepage for Boyer & Corporon Wealth Management, LLC. The page features a header with the company logo and name, and a navigation bar with links for Home, Document Vault, and Contact Us. The main content area is divided into sections for News, Announcements, My Alerts, and Trust Documents. A 'Refresh Data' button is visible in the top right corner. The page is annotated with seven yellow circles containing numbers 1 through 7, corresponding to the list items in the preceding text. Callout 1 points to the News section, 2 to Announcements, 3 to My Alerts, 4 to the Refresh Data button, 5 to the Logout link, 6 to the Document Vault link, and 7 to the Contact Us link. The footer contains the copyright notice: © 2010 CRM Software.

Personal Client Vault Tutorial
Boyer & Corporon Wealth Management

- This is the Document Vault. Here you can access your personal documents.
 - **Note:** Use a single-click to open documents. Multiple clicks will open a document multiple times.

The screenshot shows the 'Document Vault' page of the Boyer & Corporon Wealth Management system. At the top left is the B&C logo and the company name 'BOYER & CORPORON WEALTH MANAGEMENT, LLC'. To the right, it says 'B&C, Wealth Management' with links for 'My Profile' and 'Logout'. A navigation bar below the header contains 'Home', 'Document Vault', and 'Contact Us'. On the right side of the page, there is a 'Refresh Data' icon and the text 'Last: 6/19/2014 10:36:23 AM EDT'. The main content area is titled 'Document Vault' and lists several document categories: '2012 Reviews', '2013 Reviews', '2014 Reviews', and 'My Uploads'. Each category has a sub-entry for a 'February Month-End Review' with a PDF icon, a date, and a size. The 'My Uploads' category contains a document named 'Trust Documents_188997.docx' with a DOCX icon and a size of 1.0 KB. At the bottom of the page, it says '© 2010 CRM Software'.



Clicking the “Home” icon will take you back to your Personal Vault Homepage.



Clicking the “Refresh Data” icon allows you to view recently uploaded documents. Also, errors appearing on the page might be corrected by this action.

Personal Client Vault Tutorial
Boyer & Corporon Wealth Management

- Use the “Contact Us” function to communicate with BCWM through your Personal Vault.
 - Write your message in the box provided.
 - Attach file(s) to accompany your message (if applicable).
 - **Note:** Valid file types are .zip, .pdf, and .doc
 - Choose the BCWM employee who you would like to receive your message
 - Click Send
 - BCWM will respond to your message.

Contact Us

Message:

Please note, the size of individual files must not exceed 10MB.

Attach File(s): No file chosen
[+ Add Another File](#)

Send To: ▼

- Boyer, Laura
- Burns, Pat
- Clark, Eric
- Wysong, Cindy