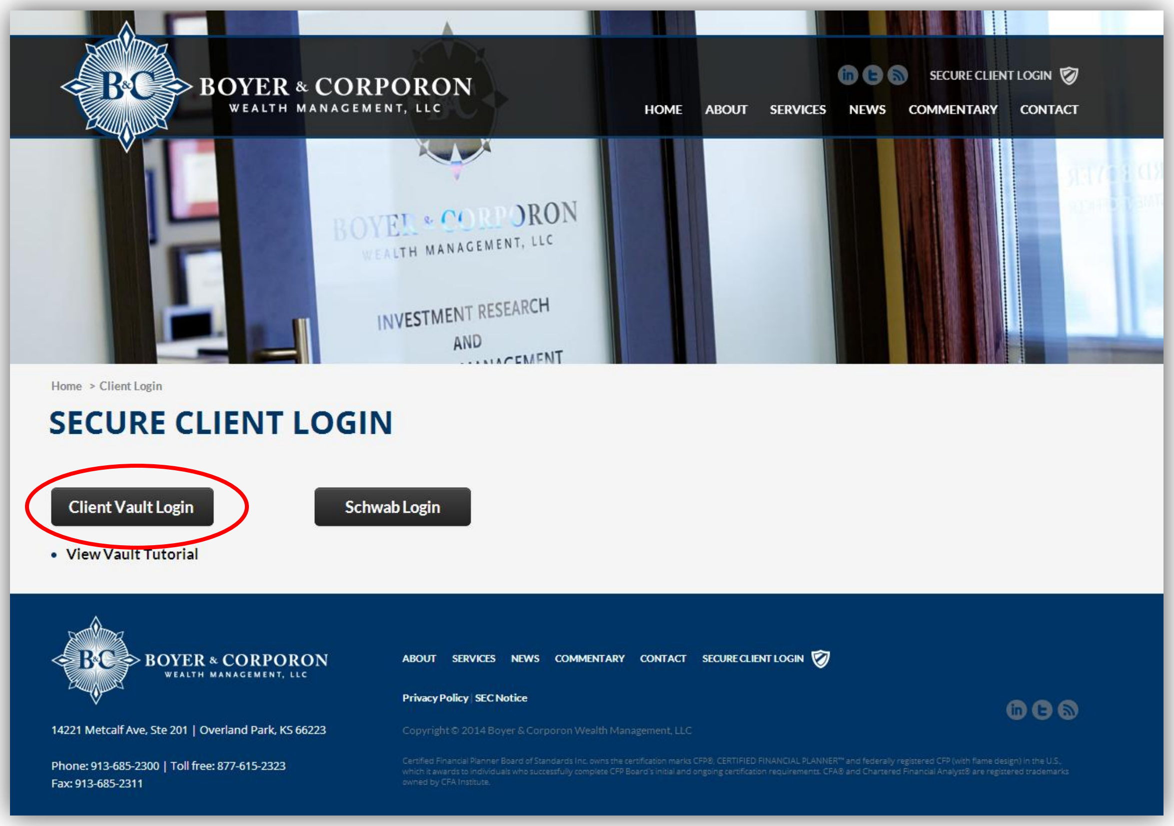
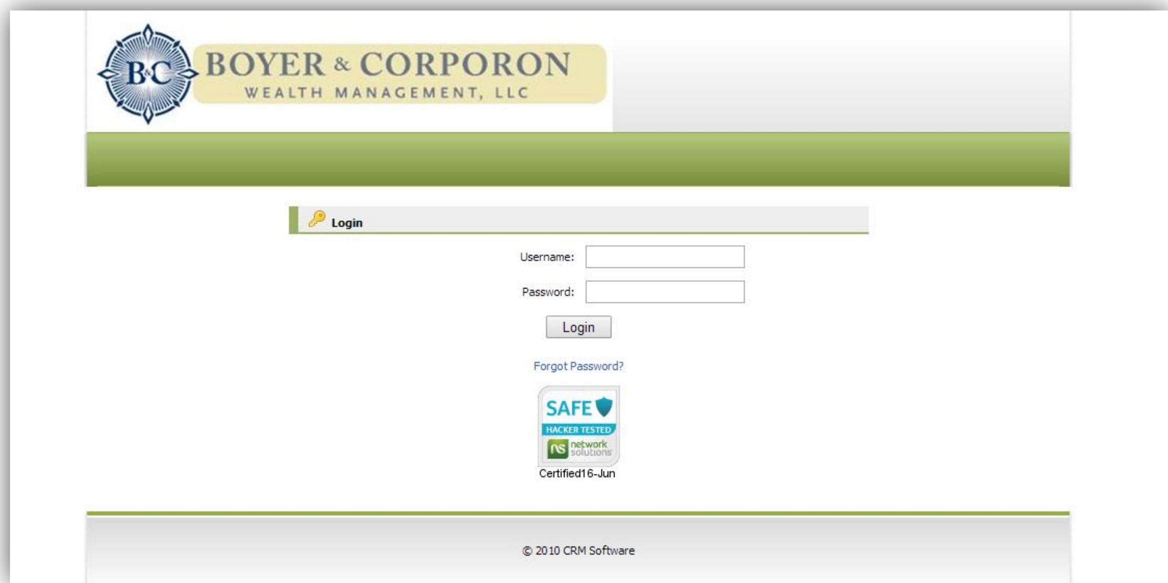
Personal Client Vault Tutorial

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!**



- 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)

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

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.

- 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).
        - <u>**Note**</u>: 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.