

Client View Live November 2009

Login Screen

The screenshot shows a Windows Internet Explorer browser window. The title bar reads "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 menu includes File, Edit, View, Favorites, Tools, and Help. The Favorites bar shows "User Log In". The page content features the SILVERSAGE logo with the tagline "Enduring Financial Wisdom" and a "Login" link. A breadcrumb trail indicates "You are here: Home". The main section is titled "User Log In" and contains a form with "User Name:" and "Password:" labels, two input fields, a "Login" button, and a "Forgot Password ?" link. The footer contains "Copyright 2008 by CRM Software | Privacy Statement | Terms Of Use". The 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 shows 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 content 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 contains links for Home, Accounts, Insurance, Document Vault, Portfolio Reports, Live Reports, and Contact Us. Below the navigation, a breadcrumb trail reads "You are here: Home". A "Refresh Data" button is visible, with the text "Last: 11/13/2009 2:44:30 PM EDT". The main content area is titled "John and Jane Sample" and is divided into three sections: "News", "Announcements", and "My Alerts". The "News" section lists three items: "Deficit doubles for government pension insurer (AP)", "Realtors: home prices to rise 4 percent in 2010 (AP)", and "J.C. Penney reports sharp drop in 3Q profit (AP)". The "Announcements" section includes "Password Safe - Wednesday, November 11, 2009" and "Welcome to your Silversage Client Console! - Tuesday, November 10, 2009". The "My Alerts" section is currently empty. On the right side, the "Contact Info" section is displayed, containing "Phone Numbers" with the number "(888) 555-1212", "Mailing Addresses" with two addresses: "123 Main Street, Town, CA 99999" and "456 Second Street, Second Town, CA 99999", and "Email Addresses" with "jsample@email.com" and "jsample2@email.com". The browser's status bar at the bottom shows "Done", "Internet", and "110%".

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

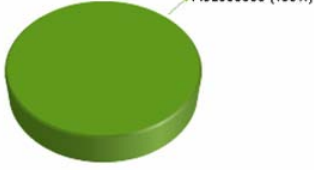
Enduring Financial Wisdom

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	

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	

\$ 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 titled "Insurance - Windows Internet Explorer". The address bar displays the URL: <http://www.junxureclientview.com/12754/Insurance/tabid/2247/Default.aspx>. The page features the SilverSage logo with the tagline "Enduring Financial Wisdom". A user profile for "John Sample" is visible in the top right corner, along with a "Logout" link and the date "Friday, November 13, 2009". A navigation menu includes links for Home, Accounts, Insurance, Document Vault, Portfolio Reports, Live Reports, and Contact Us. Below the menu, a breadcrumb trail indicates "You are here: Insurance". A "Refresh Data" button is located in the top right of the main content area, with a timestamp "Last: 11/13/2009 2:44:30 PM EDT". The main content area displays a table of insurance policies:

Policy Number	Policy Type	PlanType	Company	Owner	Insured
 AIG1234	L	LI	AIG	Client	Client

Clicking on the folder icon next to the policy number AIG1234 opens a detailed view of the policy information:



Plan Type	LI
Premium	\$ 10,000.00
Beneficiary	Spouse
Cash Value	\$ 25,000.00
Plan Name	AIG Whole Life
Policy Document	 View File

At the bottom of the page, there is a footer with the text: "Copyright 2008 by CRM Software | [Privacy Statement](#) | [Terms Of Use](#)". The browser's status bar at the bottom shows "Internet" and a zoom level of "110%".

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 user is logged in as "John Sample" with a "Logout" link. The date is "Friday, November 13, 2009". A navigation menu includes: Home, Accounts, Insurance, Document Vault, Portfolio Reports, Live Reports, and Contact Us. Below the menu, it says "You are here: Document Vault". On the right, there is a "Refresh Data" button with the text "Last: 11/13/2009 2:44:30 PM EDT". The main content area lists documents under two categories:

- 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: "Copyright 2008 by CRM Software | Privacy Statement | Terms Of Use". The browser's status bar at the bottom shows "Internet" and "110%" zoom.

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 'You are here: Portfolio Reports'. 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'. The browser's status bar at the bottom shows 'Done', 'Internet', and a zoom level of 110%.

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.