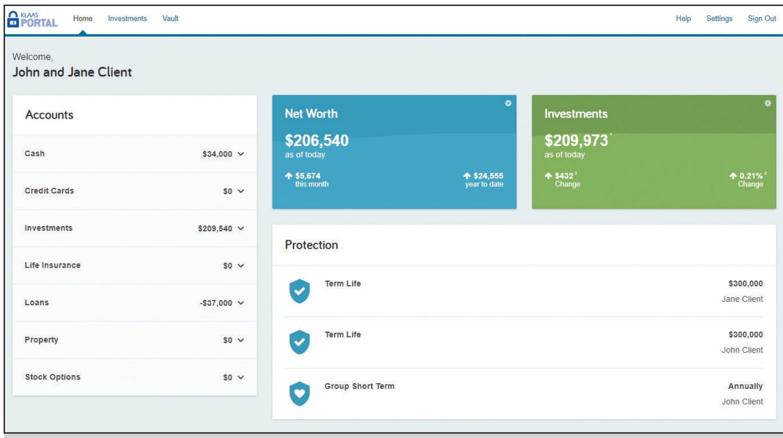
KLAAS PORTAL

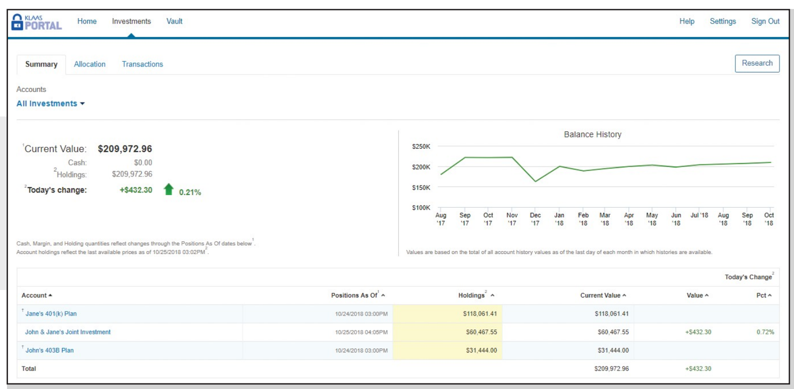
The answers you need, whenever you need.

Using Your Account

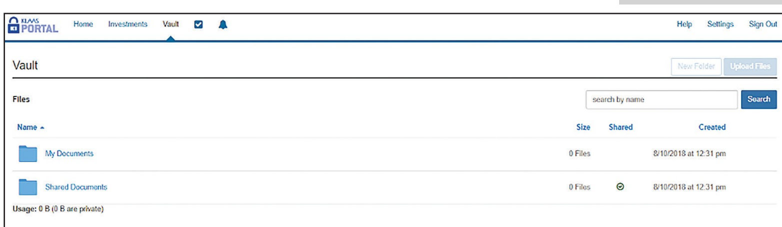
You will now be able to Navigate your Klaas Portal where you can view the Accounts in which Klaas Financial acts as your advisor. In addition, you will have access to your personal Vault where you can store confidential documents.



THE HOME PAGE Here you will find a summary of your existing investments under advisement with Klaas Financial and any additional information that has been previously provided. *Please note, this page may not reflect all your current information.*



INVESTMENTS This is a summary of your current investments. Note that the change in value is only reflected since the day it was uploaded to the Klaas Portal. *This is not a Performance Report.*



If you have documents that need to be shared with the advisor, click the "Upload Files" button in the upper right-hand corner. Please place these documents in the "Shared Documents" folder.

THE VAULT This is where you can view shared documents through the Klaas Portal. You will have access to view and download:

- Fidelity Account Statements held within the "Brokerage Account Documents" folder
- Performance and Planning Documents held within the "Reports" folder
- Signed Documents are held within the "Shared Documents" folder

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