



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.

Accounts

Cash	\$34,000
Credit Cards	\$0
Investments	\$209,540
Life Insurance	\$0
Loans	-\$27,000
Property	\$0
Stock Options	\$0

Net Worth
\$206,540
as of today
↑ \$5,674
this month
↑ \$24,586
year to date

Investments
\$209,973
as of today
↑ \$432
Change
↑ 0.21%
Change

Protection

Term Life	\$300,000	Jane Client
Term Life	\$300,000	John Client
Group Short Term	Annually	John Client

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.*

Summary Allocation Transactions

Accounts
All Investments

Current Value: \$209,972.96
Cash: \$0.00
Holdings: \$209,972.96
Today's change: +\$432.30 ↑ 0.21%

Balance History

Month	Value
Aug 17	\$150K
Sep 17	\$200K
Oct 17	\$200K
Nov 17	\$180K
Dec 17	\$180K
Jan 18	\$200K
Feb 18	\$200K
Mar 18	\$200K
Apr 18	\$200K
May 18	\$200K
Jun 18	\$200K
Jul 18	\$200K
Aug 18	\$200K
Sep 18	\$200K
Oct 18	\$200K

Account	Positions As Of	Holdings	Current Value	Value	Pat	Today's Change
Jane's 401(k) Plan	10/24/2018 03:00PM	\$118,061.41	\$118,061.41			
John & Jane's Joint Investment	10/25/2018 04:00PM	\$65,487.55	\$65,487.55	+\$432.30	0.72%	
John's 401(k) Plan	10/24/2018 03:00PM	\$31,444.00	\$31,444.00			
Total			\$209,972.96	+\$432.30		

Vault

Files

Name	Size	Shared	Created
My Documents	0 Files		8/10/2018 at 12:31 pm
Shared Documents	0 Files	🔒	8/10/2018 at 12:31 pm

Usage: 0 B (0 B are private)

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

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.