DVI Client Portal Overview

This training guide will provide an overview of the DVI Client Portal. The DVI Client Portal is a Personal Financial Website that will provide you with a consolidated view of your financial information.

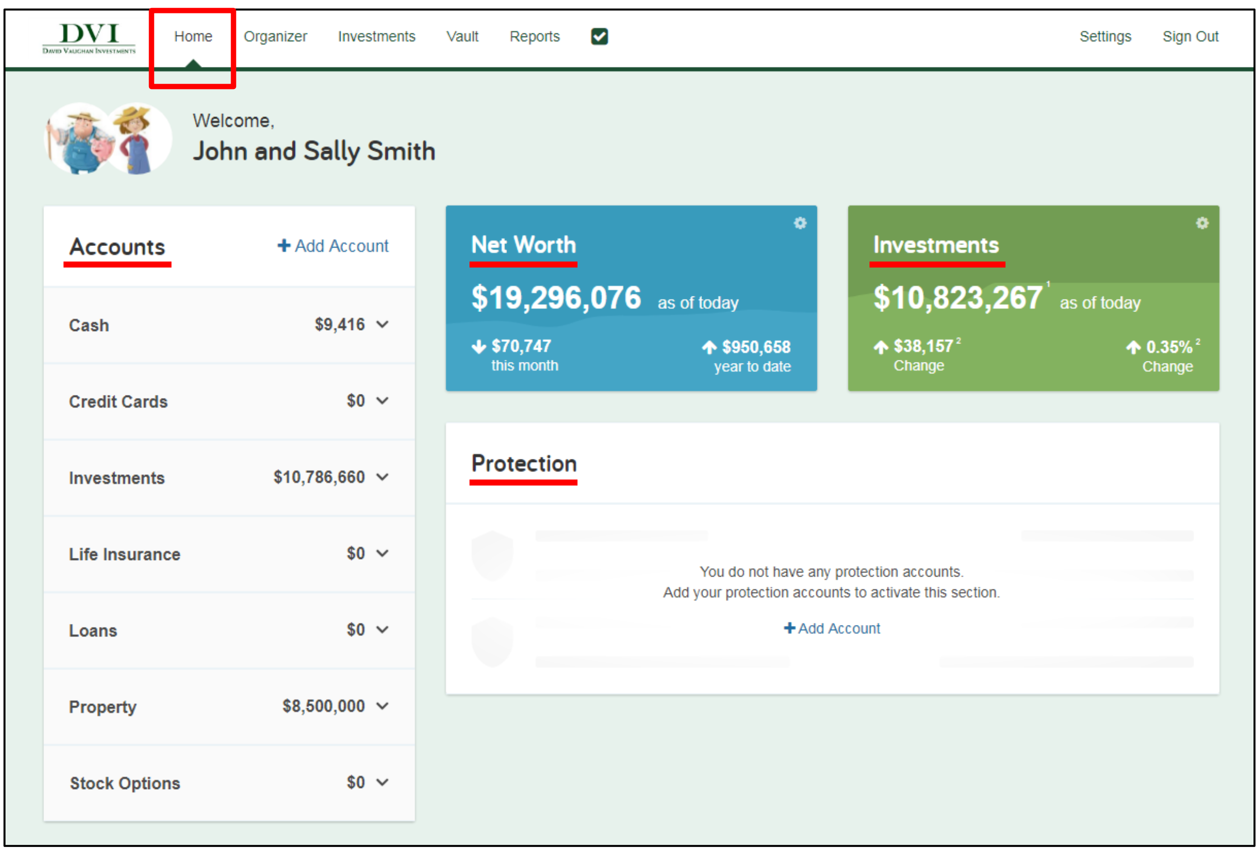
The features available include the **Organizer**, **Reports**, and the **Vault.**

Note – 3 security questions, and a phone number for [2-Factor Authentication]() will need to be established the first time you log in. Each subsequent log in attempt will prompt for an answer to 1 of the 3 selected security questions unless this box is checked:

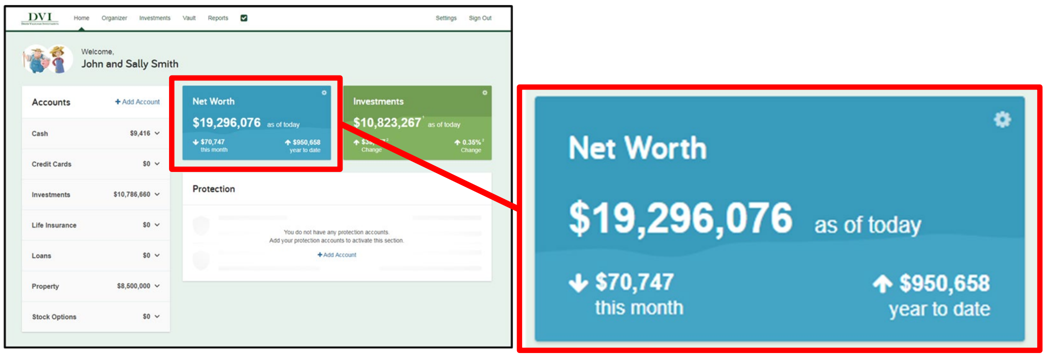
☐ Don't ask me again from this device

Note – For questions about logging in or resetting your password please contact AnneMarie Brinton (abrinton@dviinc.com) or Amy Cowen-Walden (amy@dviinc.com) or call 309-685-0033.

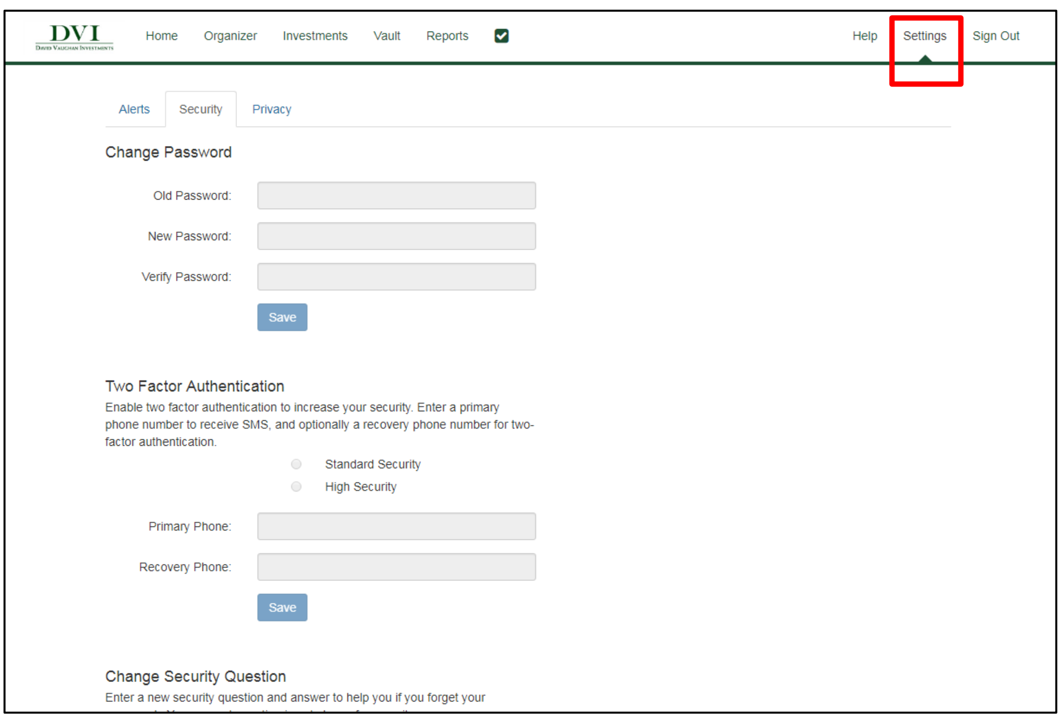
1. Your **Home** page is where you will see a quick summary of your Accounts, Net Worth, Investments and Protections (Insurance policies).



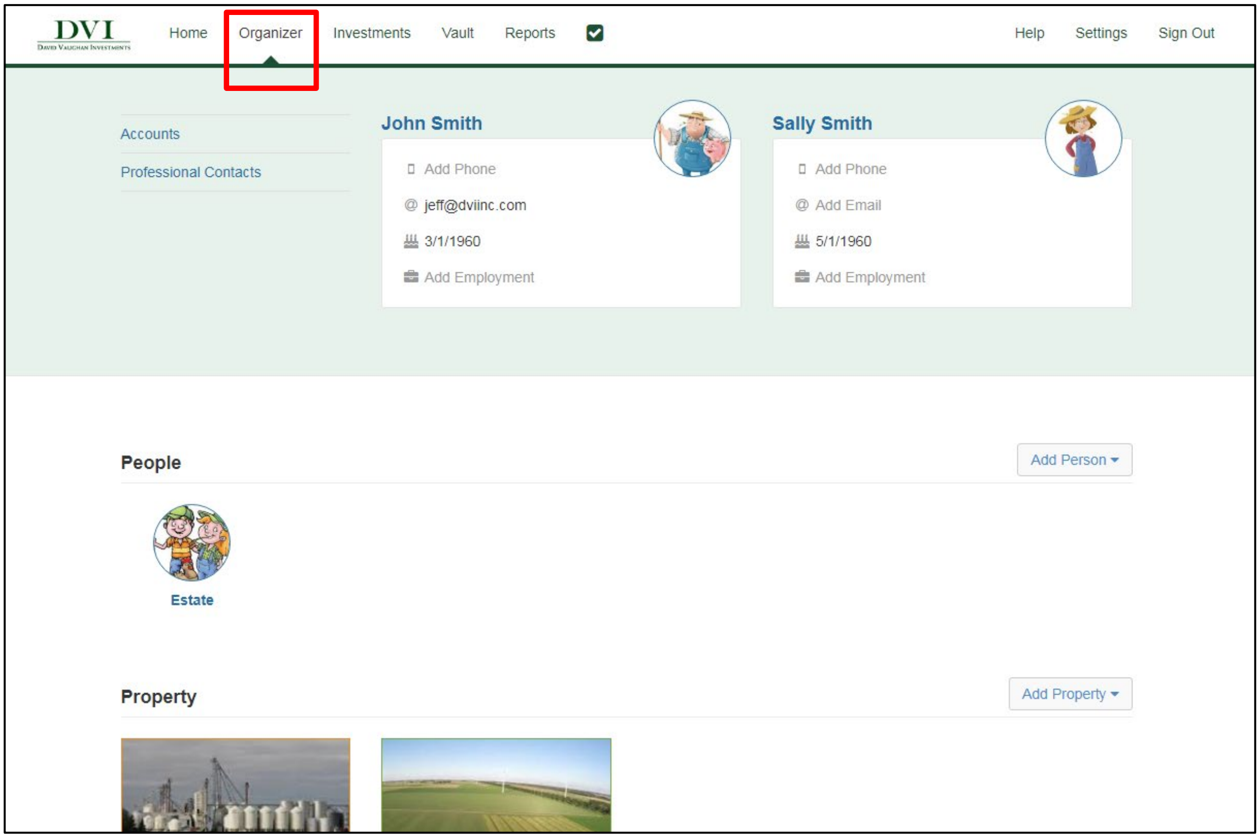
Note – Net worth is calculated by totaling your assets and liabilities. The change in net worth is impacted by account deposits and withdrawals. The % change listed is not actual investment performance.



2. Click **Settings** to set alerts, and update security & privacy settings.



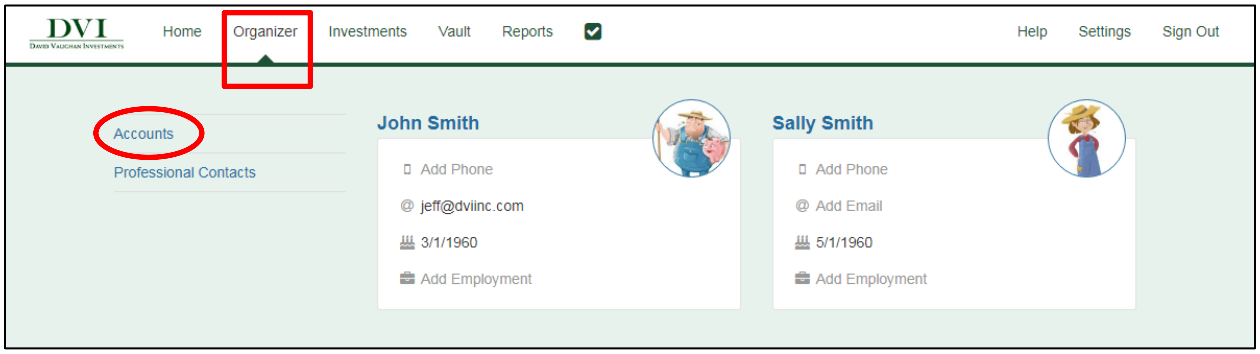
3. The **Organizer** is a place to connect outside accounts and view their data.



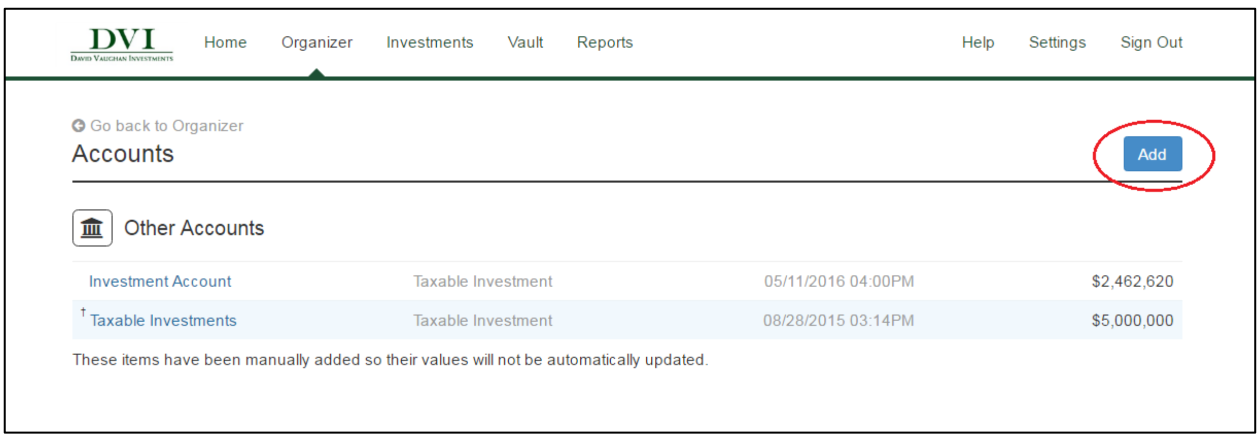
Note – Before you can add accounts to the organizer, you must already have online access to your accounts through your financial institution(s).

Steps 4-6 offer a quick reference on adding connections. For more information and detailed instructions, see our "How to Connect Accounts" guide.

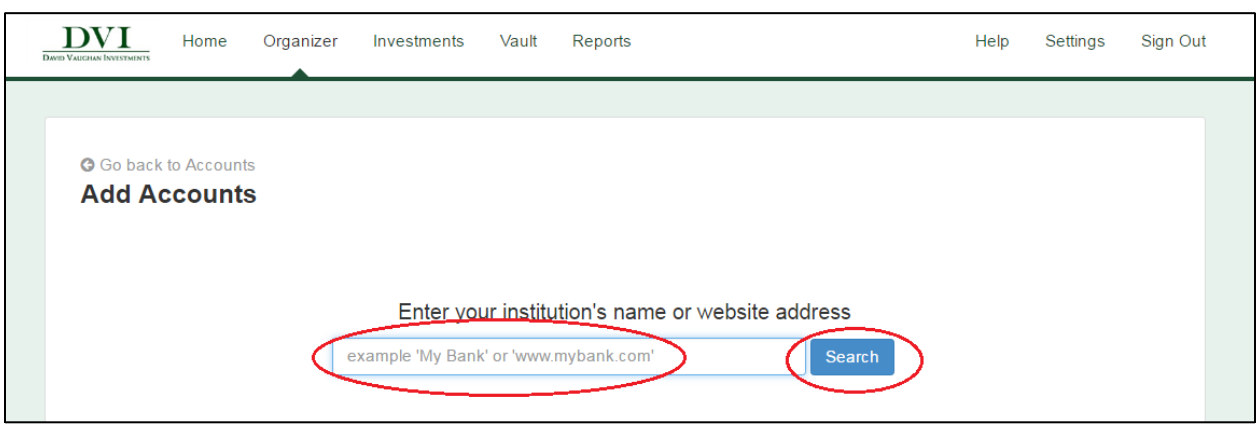
4. To add accounts to the **Organizer**, click **Accounts**.



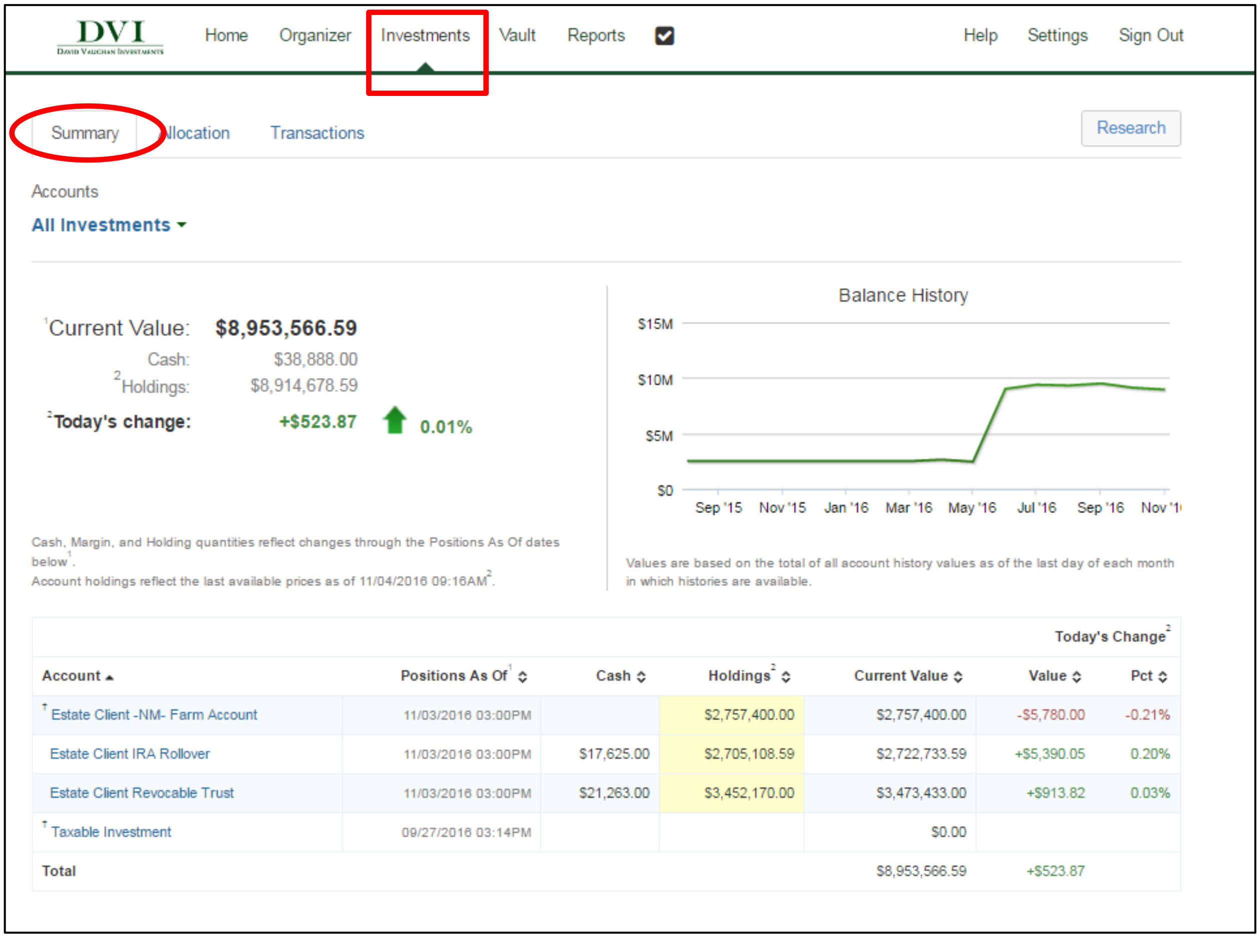
5. Click the **Add** button to search for a specific institution.



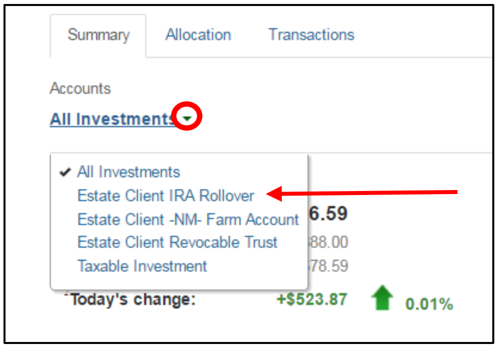
6. Type in the name of the institution where you have accounts and click **Search**.

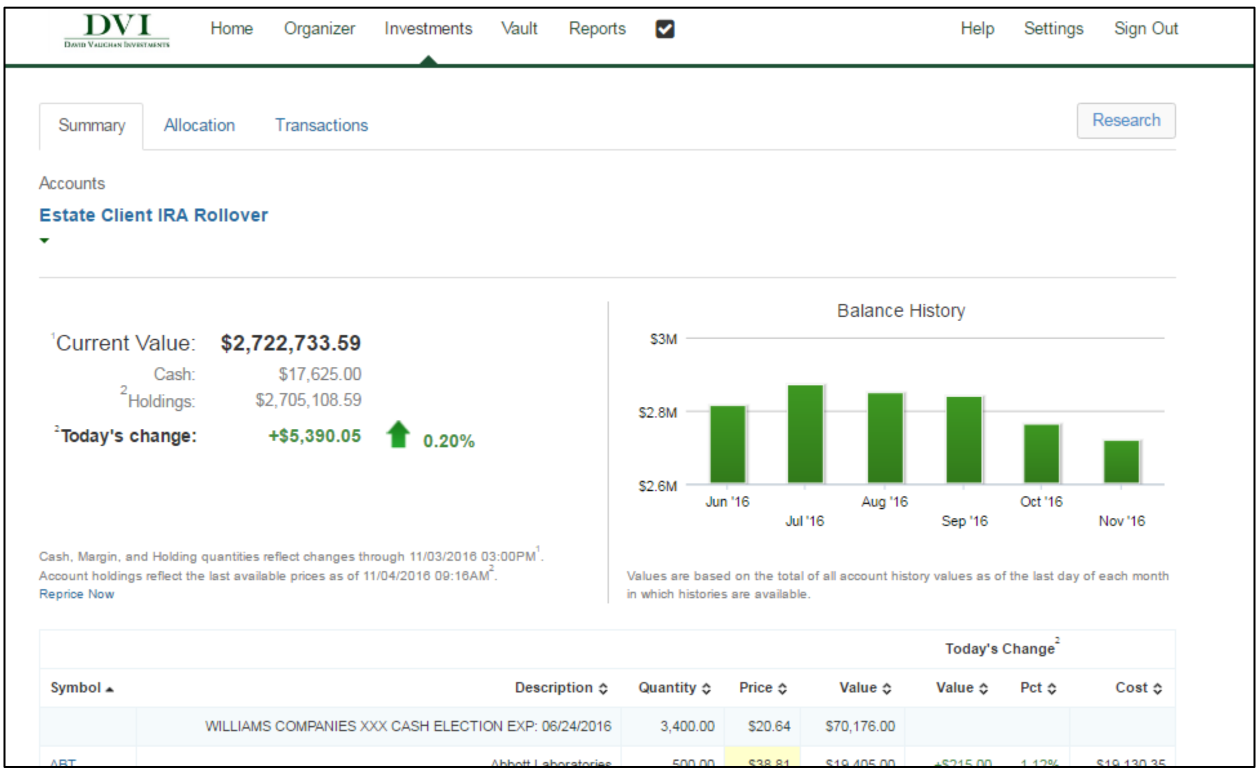


7. The **Investments** tab allows you to view up-to-date market information based on any connected investments.

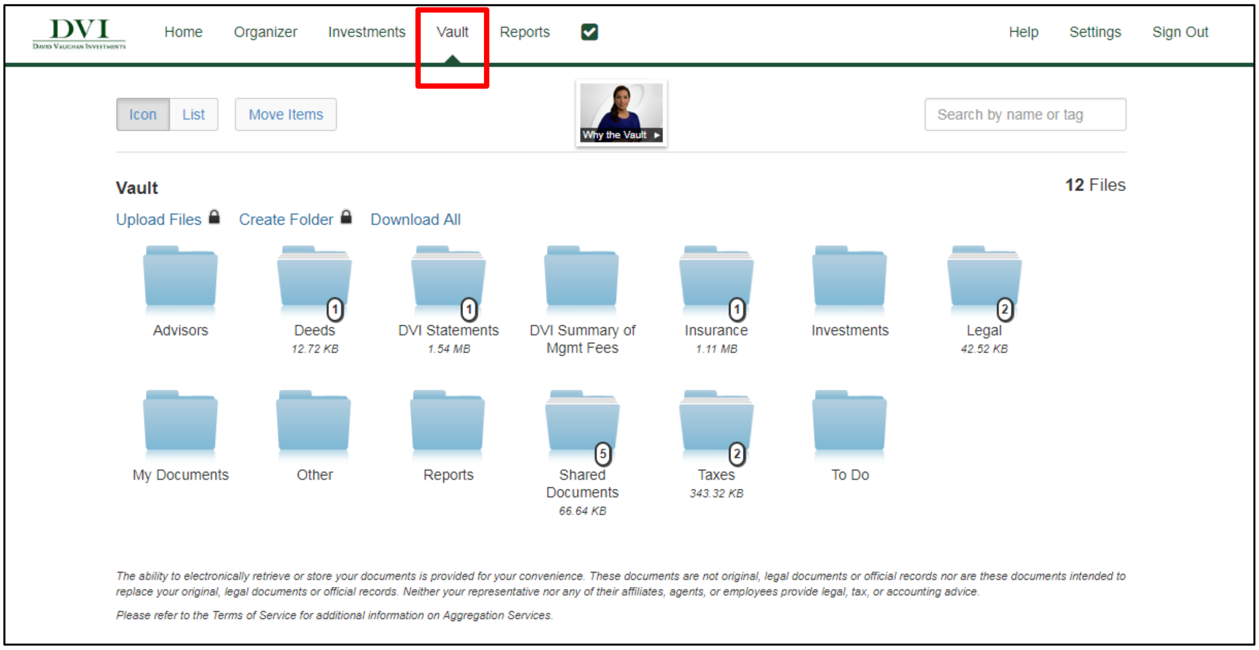


8. Click on the **Account Name** to see a holdings break down of a given account.





9. The **Vault** provides secure storage for valuable personal documents (**wills, trusts, insurance documents, passports, etc.**) in electronic format.
    a. You can upload documents into the **My Documents** folder, a private folder which only you can access the contents.
    b. You can upload documents into any of the other folders, allowing the Advisor to also view the contents.
    c. DVI will upload your Quarterly Statements into the DVI Statements folder and your Summary of Management Fees Documents into the DVI Summary of Mgmt Fees folder every quarter.



Note – The Vault allows storage files of the following types: aifc, aiff, aif, au, avi, bmp, doc, docx, gif, jpg, jpeg, mov, mp3, mpeg, mpg, pdf, png, ppt, pptx, ps, rtf, snd, swf, tax, tif, tiff, txt, wav, wma, wmv, wps, xls, xlsx, and xml.

10. The **Reports** tab provides a series of statements about your financial situation. To view a report, simply choose from the drop down list located under Report Selection.