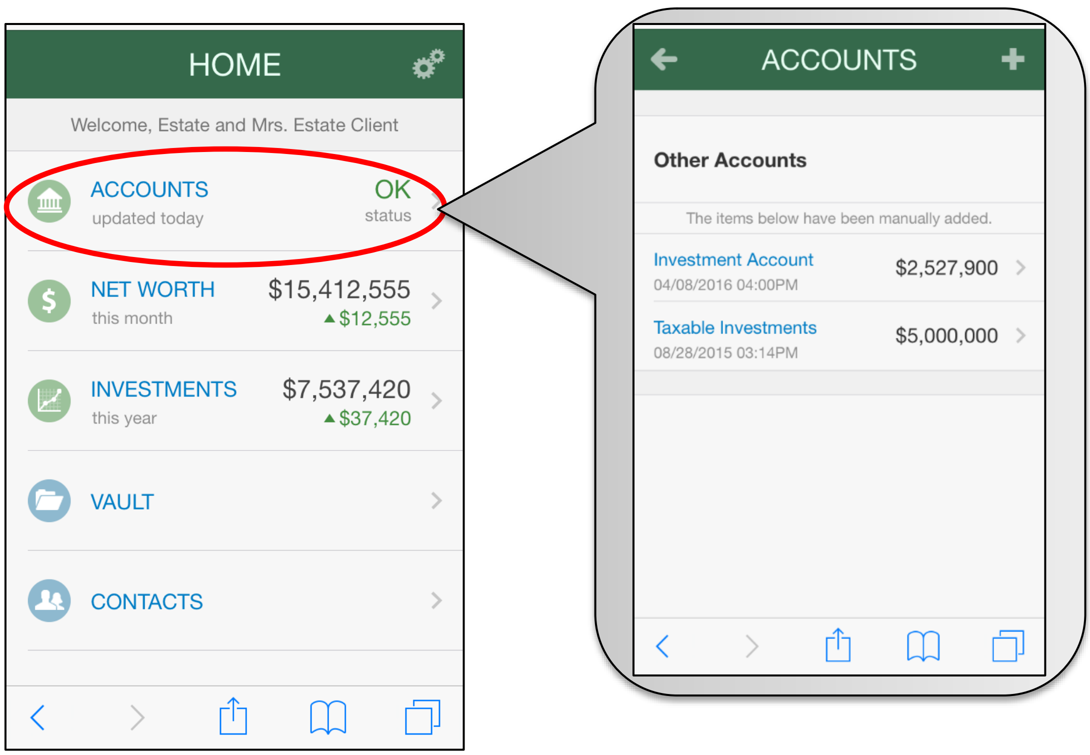
DVI
DAVID VAUGHAN INVESTMENTS

DVI Client Portal Mobile Site Overview

This training guide will demonstrate the functionality of the DVI Client Portal Mobile Site. The Mobile Site is a consolidated view of the financial information in your personal financial website.

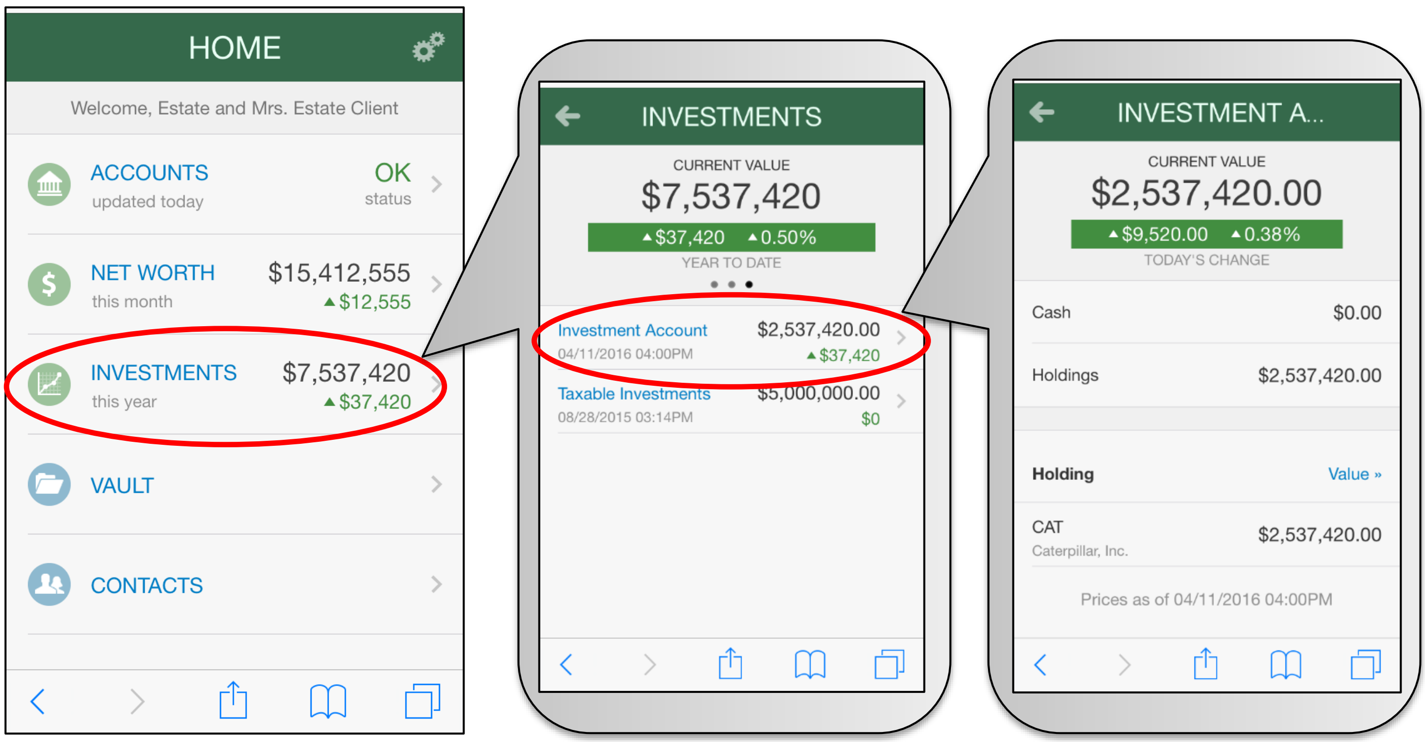
This guide will give a brief overview the following features: **Accounts**, **Investments** and the **Vault**.

1. From your smart phone, click the mobile app and log in.
2. Tap **Accounts** to view your latest account data.



Note – To add an icon that links to the DVI Client Portal Mobile Site to your smartphone or tablet, see our "Add Mobile Icon" guides.

3. Tap **Investments** to view up-to-date market information for any connected investment.
4. Tap an account name to see a holdings break down of that account.



Note – The change in value reported for each account reflects the change in the account's total value and is impacted by deposits and withdrawals. The % change listed is not actual investment performance.

5. Tap **Vault** to view personal documents in electronic format.
    a. Tap **My Documents or Shared Documents** to upload documents into your vault. Note that the **My Documents** is a private folder in which only you, the client, can view the file.
    b. Tap the "+" in the upper right hand corner to add a document.