

**LeConte Wealth  
Management**

# Performance Portal User Guide

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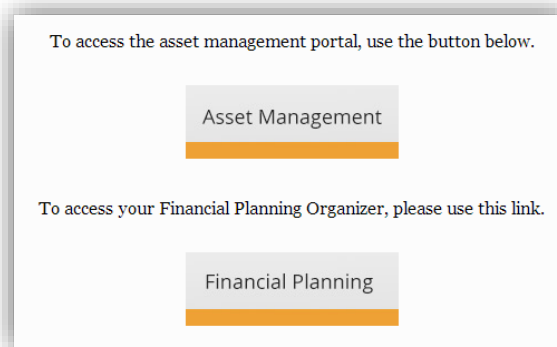
## GET STARTED - LOGGING IN

To access the asset management portal, first go to [www.LeconteWealth.com](http://www.LeconteWealth.com)

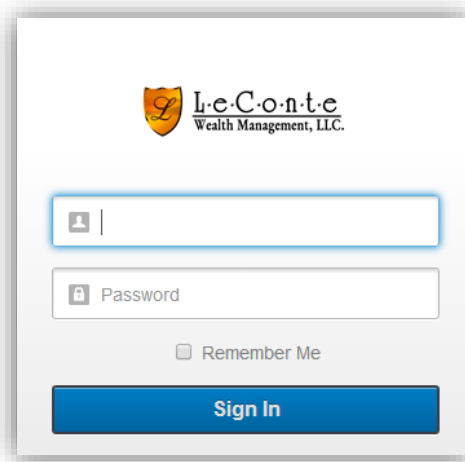
Click on **Client Login**.



There are two different options to log-in, you will want to select **Asset Management**.



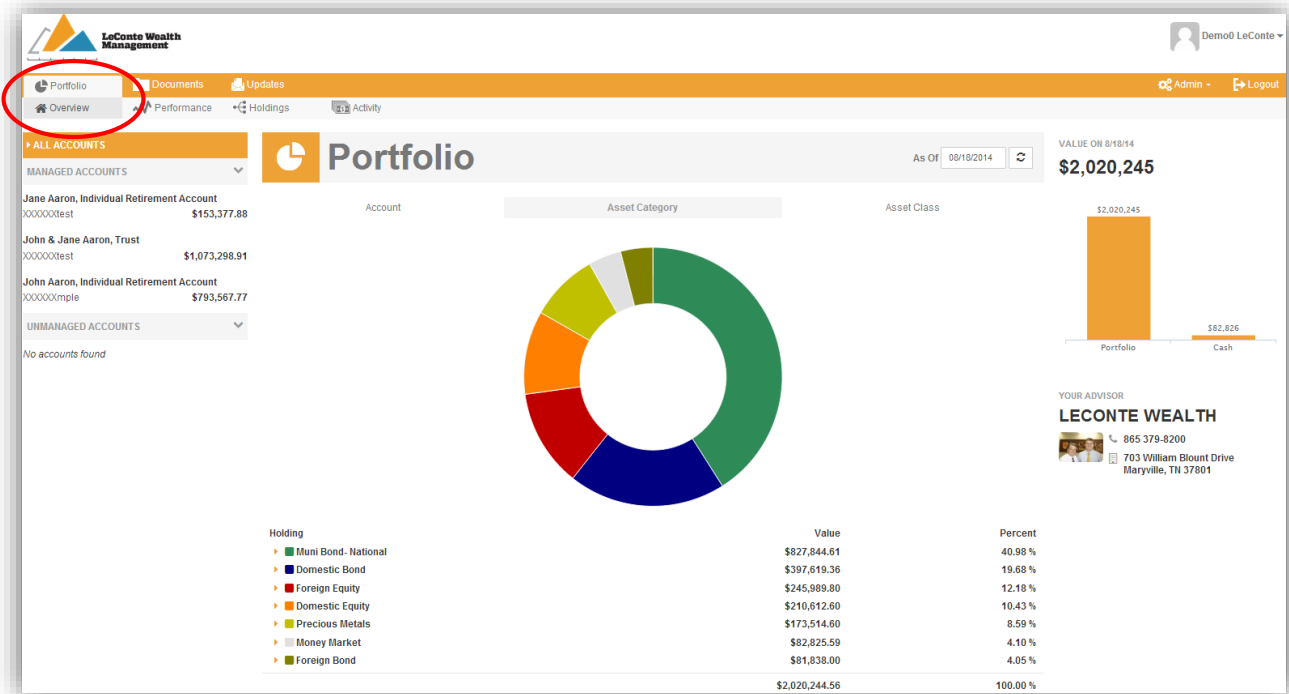
Enter your **username** and **password**, select the **Remember Me** option and then click sign-in.



# PORTFOLIO

## OVERVIEW

After you successfully log in, the page will default to the **Portfolio Overview** tab and look similar to the household below.



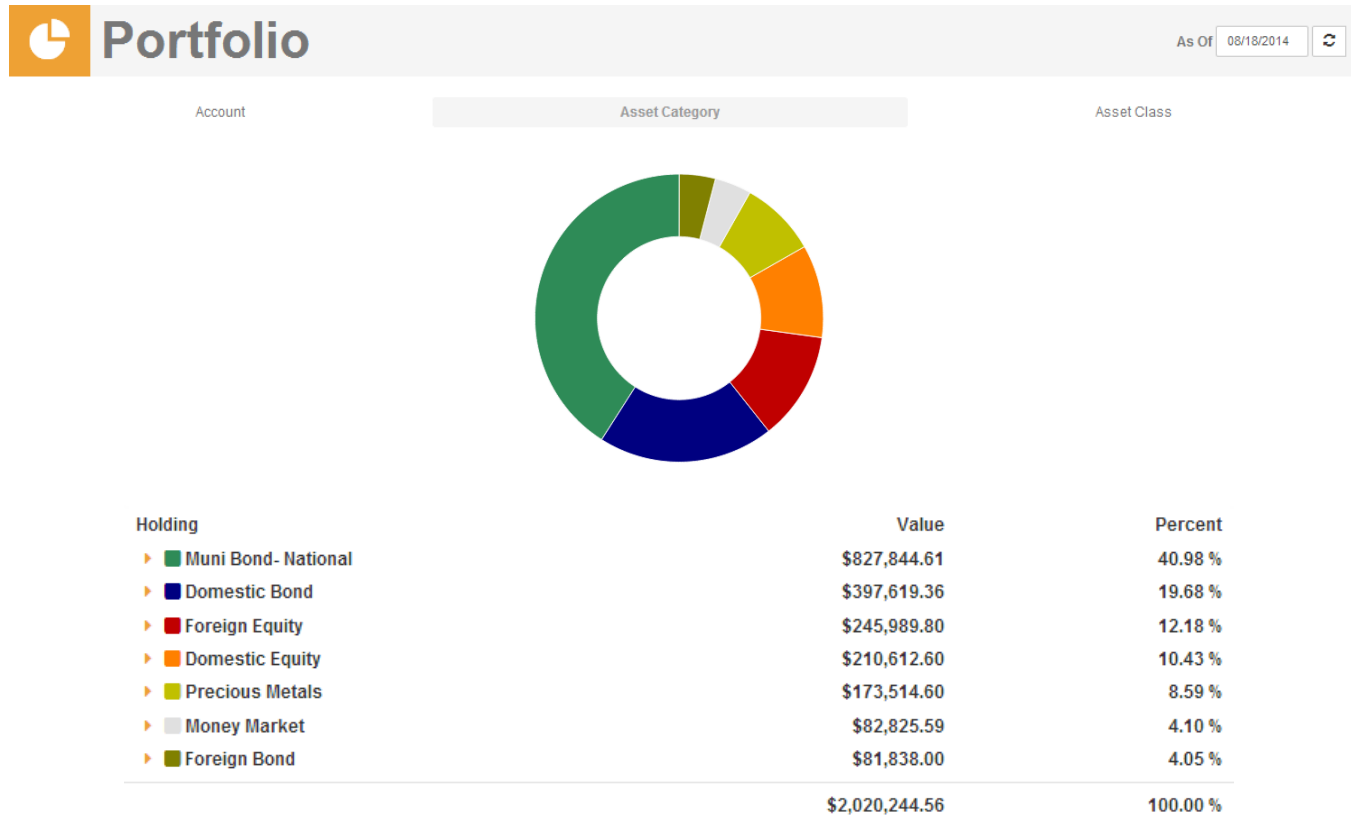
ALL ACCOUNTS

MANAGED ACCOUNTS

Jane Aaron, Individual Retirement Account	123456test	\$152,275.53
John & Jane Aaron, Trust	1234tdtest	\$1,066,256.55
John Aaron, Individual Retirement Account	0123sample	\$787,453.25

On the left, **All Accounts** is selected by default; as a result, the data displayed on this page is for all of your accounts with LeConte.

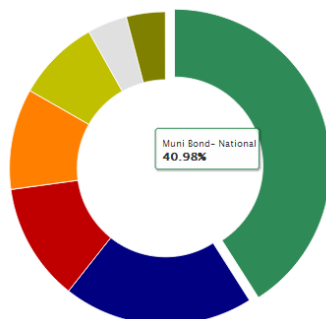
The **Portfolio panel** in the center defaults to show all household holdings by Asset Category.



You can click on the orange triangle to the right of each Asset Category to see all holdings within that category.

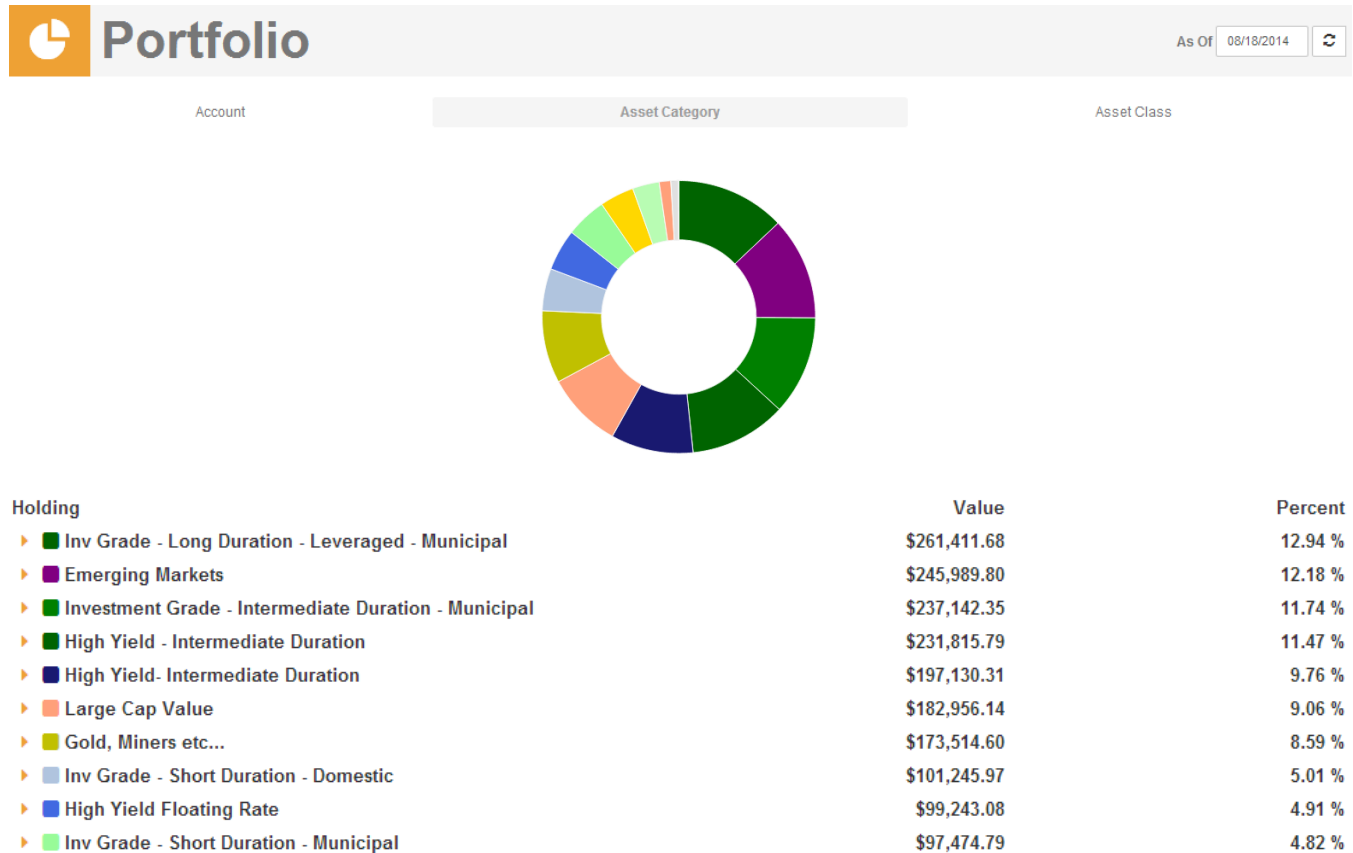
Holding	Value	Percent
▶ <b>Muni Bond- National</b>	<b>\$827,844.61</b>	<b>40.98 %</b>
<i>Oppenheimer Rochester Natl Municipal Y (ORNYX)</i>	\$231,815.79	11.47 %
<i>PowerShares Insured Natl Muni Bond (PZA)</i>	\$136,805.76	6.77 %
<i>SPDR Barclays Municipal (TFI)</i>	\$128,468.43	6.36 %
<i>Invesco Insured Municipal Income Trust (IIM)</i>	\$124,605.92	6.17 %
<i>iShares S&amp;P National Municipal Bond (MUB)</i>	\$108,673.92	5.38 %
<i>Vanguard Short Term Tax-Exempt Admiral (VWSUX)</i>	\$97,474.79	4.82 %

The same details will expand below when you click on each section of the graph. In the below picture, the dark green section was clicked-on and the correlating section below expanded to show all holdings within that Asset Category.



Holding	Value	Percent
<b>Muni Bond- National</b>	<b>\$827,844.61</b>	<b>40.98 %</b>
<i>Oppenheimer Rochester Natl Municipal Y (ORNYX)</i>	\$231,815.79	11.47 %
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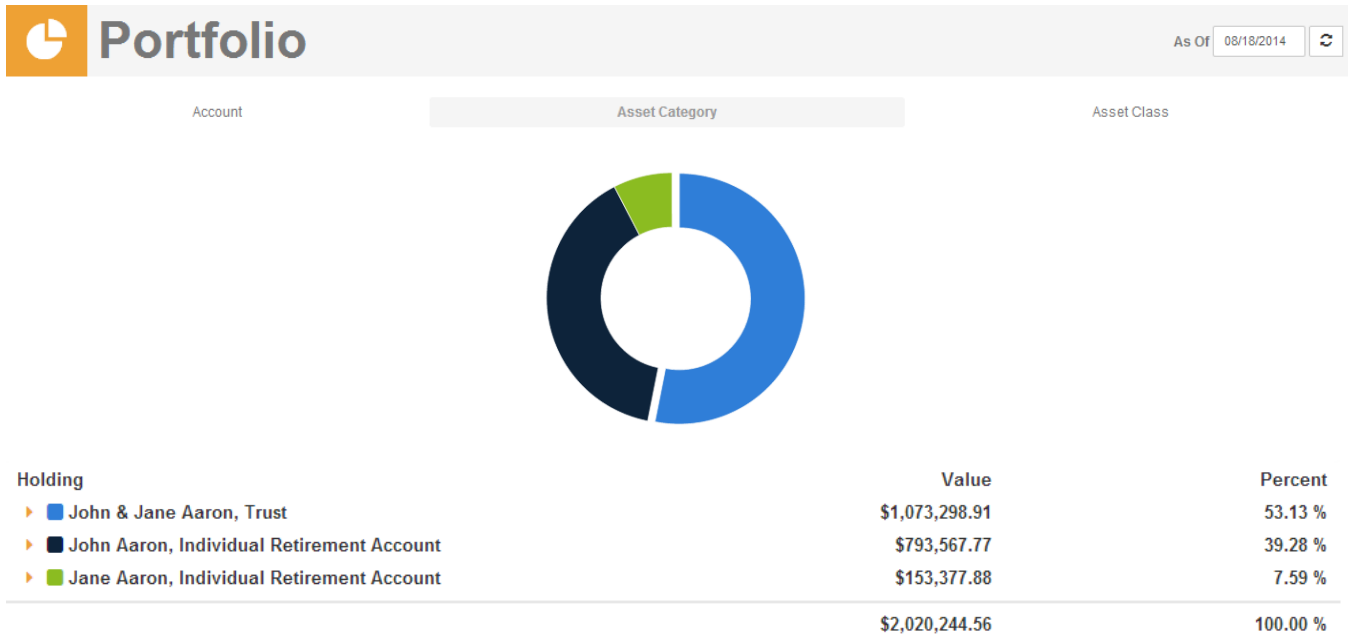
Another option is to view your holdings by **Asset Class**. Select Asset Class above the graph and you will notice the graph change colors with each section referencing the asset class such as Emerging Markets, Large Cap value, etc.



Once again, you can expand each asset class to view holdings by clicking on the orange triangle or by clicking on a section of the graph.

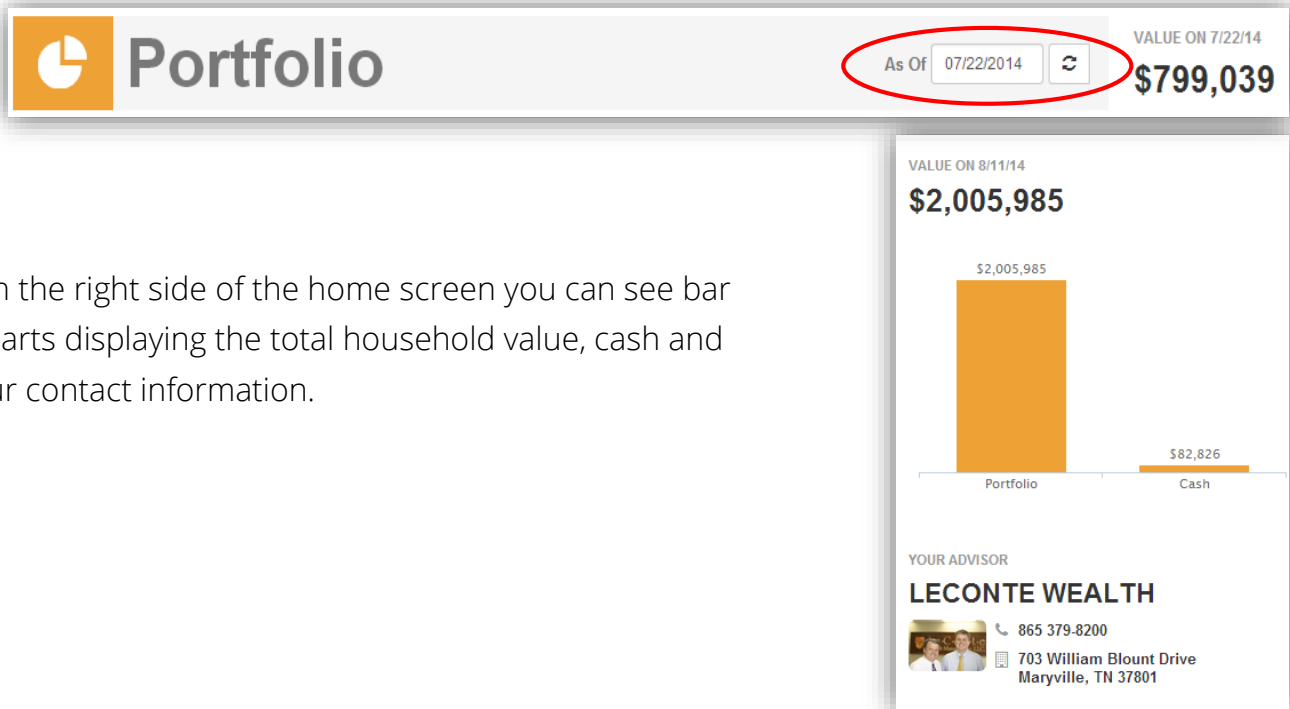
Holding	Value	Percent
▲ Inv Grade - Long Duration - Leveraged - Municipal	\$261,411.68	12.94 %
PowerShares Insured Natl Muni Bond (PZA)	\$136,805.76	6.77 %
Invesco Insured Municipal Income Trust (IIM)	\$124,605.92	6.17 %
▲ Emerging Markets	\$245,989.80	12.18 %
PowerShares FTSE RAFI Emerging Markets (PXH)	\$76,314.00	3.78 %
PowerShares S&P Emerging Markets Low Vol (EELV)	\$74,164.65	3.67 %
PowerShares S&P Emerging Markets Low Vol (EELV)	\$38,636.50	1.91 %
PowerShares FTSE RAFI Emerging Markets (PXH)	\$30,525.60	1.51 %
PowerShares S&P Emerging Markets Low Vol (EELV)	\$13,740.65	0.68 %
PowerShares FTSE RAFI Emerging Markets (PXH)	\$12,608.40	0.62 %

To see an overview of all accounts you have at LeConte, select the Account tab.



By expanding an account in your household, you can view the holdings for each, the total value and total percentage of assets in each account.

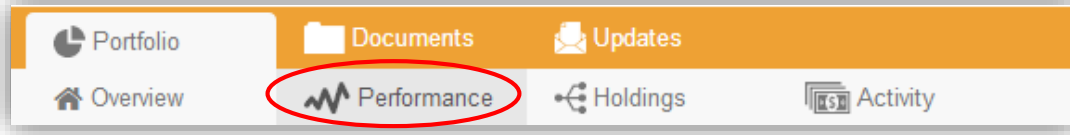
The default time period on the home screen can be changed by typing a new date in the **As Of** Box and clicking the **refresh icon**.



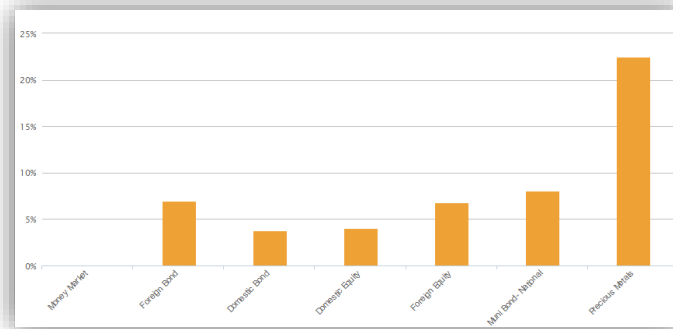


## PORTFOLIO PERFORMANCE

Select the **Performance** sub-item next to Overview on the Portfolio tab to view household performance.



The chart below provides visual representation of each asset category's performance



The panel defaults to YTD time frame which can easily be changed by either manually changing dates and refreshing or using the drop down list to pick a common time interval. This section shows performance by broad Asset Category descriptions.

Asset Category	Asset Class
<b>Holding</b>	<b>Market Value</b> <b>Return</b> <b>Benchmark</b>
▶ Money Market	\$82,825.59      0.01 %      7.97 %
▶ Foreign Bond	\$83,028.00      6.96 %      7.97 %
▶ Domestic Bond	\$397,710.75      3.77 %      7.97 %
▶ Domestic Equity	\$213,888.84      4.07 %      7.97 %
▶ Foreign Equity	\$245,074.90      6.81 %      7.97 %
▶ Muni Bond - National	\$821,140.80      8.06 %      7.97 %
▶ Precious Metals	\$181,062.28      22.48 %      11.84 %

Each category can be expanded by clicking on the orange triangle ▶.

Holding	Market Value	Return	Benchmark
<ul style="list-style-type: none"> <li>Money Market <ul style="list-style-type: none"> <li>TD Ameritrade Cash Fund** (TMCASH100) \$259.47 0.00 % 7.97 %</li> <li>TD Ameritrade Municipal (WTMXX) \$63,980.03 0.01 % 7.97 %</li> <li>TD Bank USA FDIC Insrd Deposit NC by SIPC (IDA12) \$18,586.09 0.01 % 7.97 %</li> </ul> </li> </ul>			

By clicking on a specific account in the Accounts Panel on the left you can view the performance by asset class of that account.

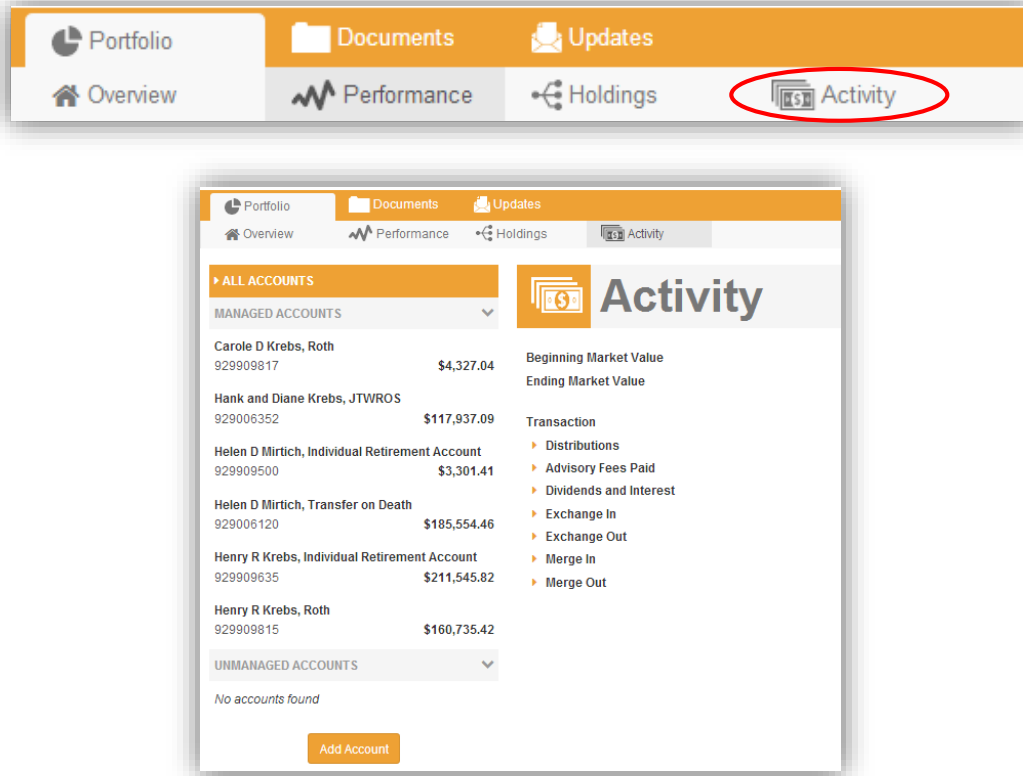
## PORTFOLIO HOLDINGS

Select the **Holdings** sub-item next to Performance on the Portfolio tab to and the center panel displays a detailed view your holdings and cost basis.

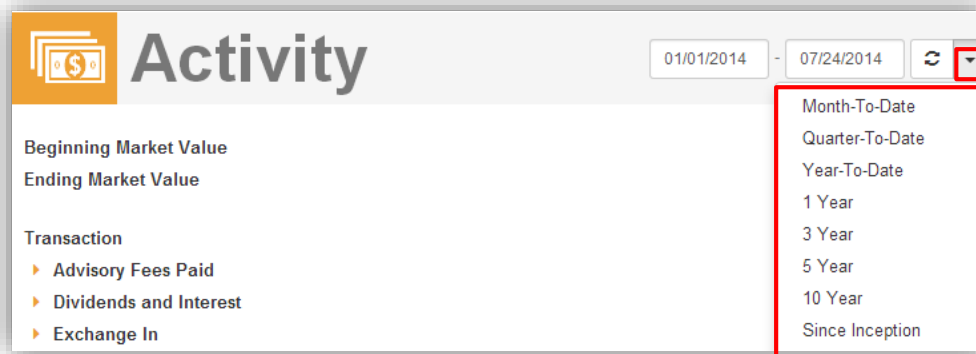
Asset Category		Asset Class		
Holding	Market Value	Cost Basis	Shares	Percent
▶ Muni Bond- National	\$822,089.69	\$97,428.64	--	40.66 %
▶ Domestic Bond	\$397,907.89	\$100,135.30	--	19.68 %
▶ Foreign Equity	\$247,147.92	\$120,159.60	--	12.22 %
▶ Domestic Equity	\$214,883.19	\$0.00	--	10.63 %
▶ Precious Metals	\$173,637.66	\$158,118.93	--	8.59 %
▶ Foreign Bond	\$83,504.00	\$80,434.57	--	4.13 %
▶ Money Market	\$82,825.59	\$82,825.59	--	4.10 %
	<b>\$2,021,995.94</b>	<b>\$639,102.63</b>		<b>100.00 %</b>

## PORTFOLIO ACTIVITY

When you select the **Activity** sub-item next to Holdings on the Portfolio tab, the center panel displays a detail of your account history including advisory fees paid, dividends and interest earned, exchanges in or out and merges in.



The activity history screen defaults to showing YTD transactions. You can manually change the date by entering in your own date range or select one of the options available in the **drop-down menu** and then click the refresh button.



Expand each section by clicking on the orange triangle to view the date, fund name and dollar amount of each transaction as shown below.

Activity		07/01/2014	08/15/2014	↻	▼
<b>Beginning Market Value</b>		<b>\$2,015,413.66</b>			
<b>Ending Market Value</b>		<b>\$2,016,945.06</b>			
Transaction	Dollar Movement				
▲ <b>Advisory Fees Paid</b>	<b>(\$5,079.95)</b>				
7/9/14	TD Ameritrade Cash Fund** (TMCASH100)	TD Ameritrade	1234tdtest	(\$2,691.69)	
7/9/14	TD Ameritrade Cash Fund** (TMCASH100)	TD Ameritrade	123456test	(\$386.53)	
7/9/14	TD Ameritrade Cash Fund** (TMCASH100)	TD Ameritrade	0123sam...	(\$2,001.73)	

## DOCUMENTS

### CLOUD STORAGE

Portfolio
Documents
Updates

Cloud Storage
Reports

**REPORT LIST**

PORTFOLIO ▼

Consolidated Portfolio Po...

Estimated Income Report

Invested Value Compariso...

LWM Gain Loss with Income

LWM Portfolio Appraisal

Performance Report

Portfolio Position

Portfolio Valuation

**Cloud Storage**

Download file(s) from the cloud

Not linked. Click to link your account.

**Box**

Simple, Secure Sharing from Anywhere

Not linked. Click to link your account.

**Dropbox**

Your stuff, anywhere

### REPORTS

## UPDATES

### COMMENTARY

Portfolio Documents Updates

Commentary News Feed


### Advisor Commentary

Latest news and information from your advisor. Check back often!

*No commentary found*

YOUR ADVISOR

### LECONTE WEALTH



865 379-8200

703 William Blount Drive  
Maryville, TN 37801

### NEWS FEED

Portfolio Documents Updates Admin

Commentary News Feed

#### CNN.com - Business

CNN.com delivers up-to-the-minute news and information on the latest top stories, weather, entertainment, politics and more.

#### Games teach kids about money

Whose job is it to nurture financial literacy? Neale Godfrey, president of Green Street Commons, on making kids money savvy.

Tue, 12 Aug 2014 09:11:17 -0700

#### Make \$8 million on Kickstarter

Just \$50,000. That was the humble fundraising goal Ryan Grepper set on July 8, lowering his expectations for the second ...

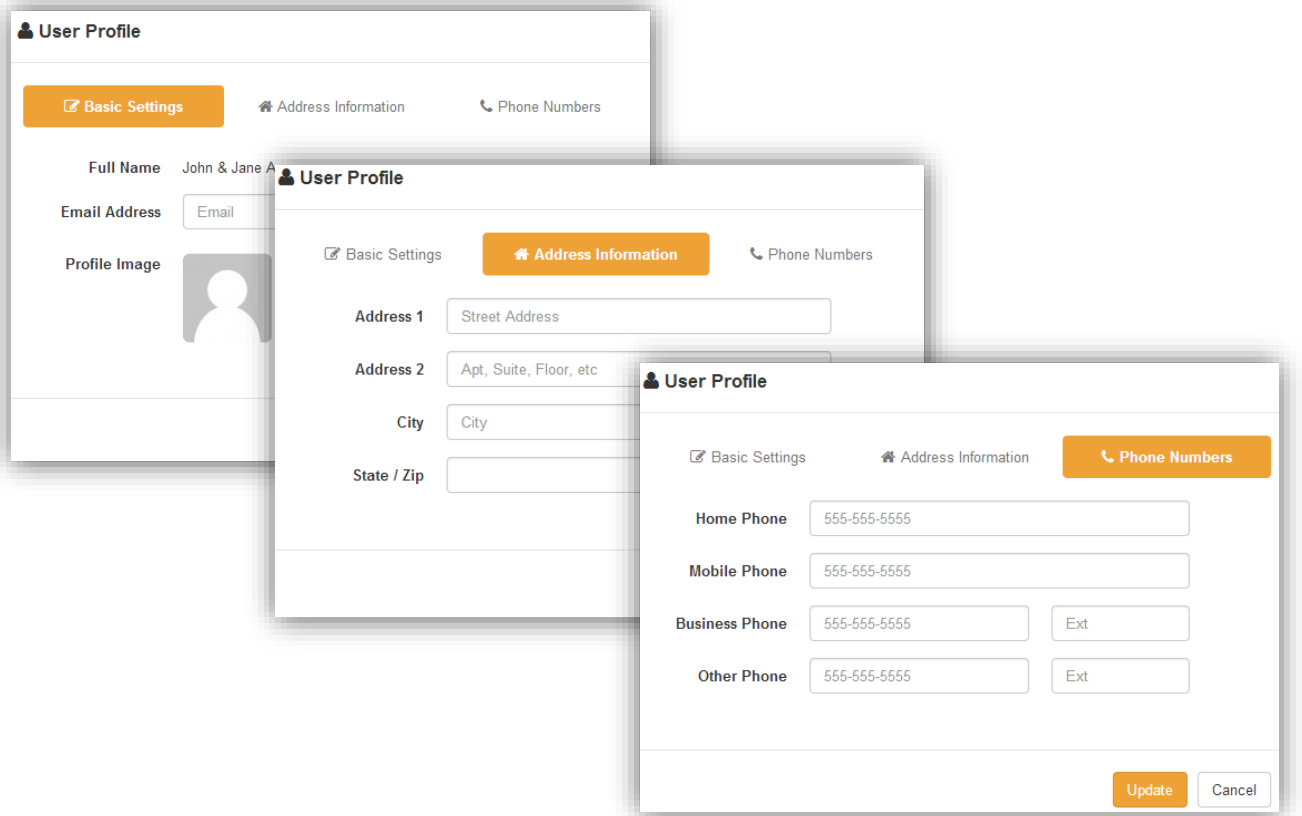
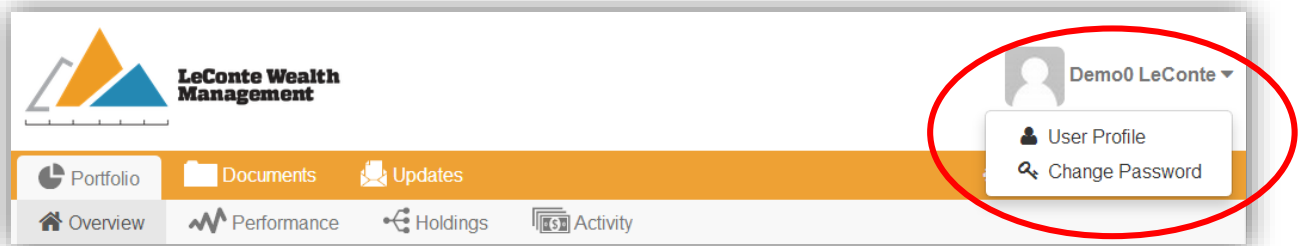
Tue, 12 Aug 2014 08:48:36 -0700

## SETTINGS

In the top right hand corner of the Orion site, you can click on your name (Demo0 Leconte below) to manage your user profile and change your password.

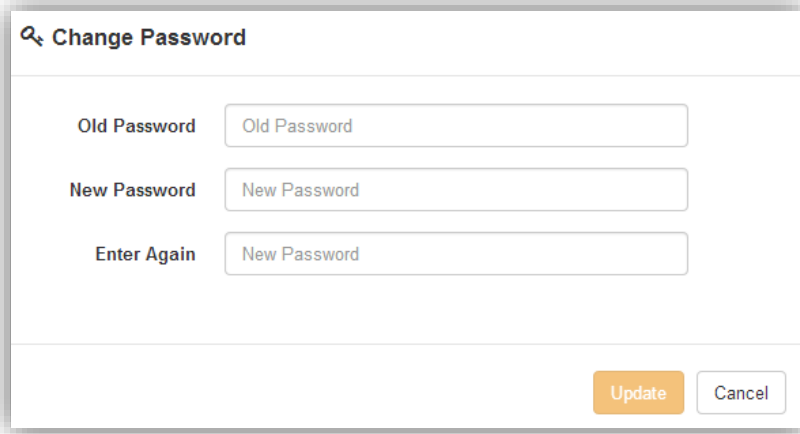
### USER PROFILE

Within the **User Profile**, you have the ability to change your email address, add a photo/image, change your mailing address and phone numbers.



## CHANGE PASSWORD

If you would like to change your password, you can do so within your setting under Change Password. Your password must contain one lower case letter, one upper case letter and a number with a total minimum number of ? characters.



A dialog box titled "Change Password" with a magnifying glass icon. It contains three input fields: "Old Password" with the placeholder text "Old Password", "New Password" with the placeholder text "New Password", and "Enter Again" with the placeholder text "New Password". At the bottom right, there are two buttons: "Update" (orange) and "Cancel" (white).