



INTRODUCING MERISTEM’S NEW CLIENT PORTAL

Welcome to Meristem’s new portal tool powered by Tamarac. Besides providing a platform for delivery and storage of quarterly reports, it provides online access to your comprehensive portfolio information in a dynamic way. The following is an introductory guide with basic instructions and screen clippings to help you navigate for starters. Please contact your advisory team with additional questions and feedback. We are committed to optimizing client experience.

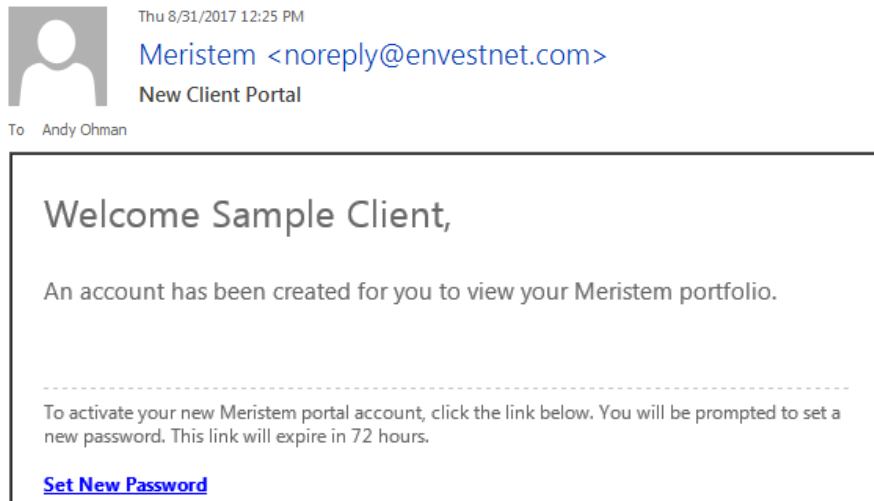
TABLE OF CONTENTS

Logging In	2
Initial Log In	2
Forgot Password.....	3
Dashboard Page Overview	4
Dashboard Tiles.....	5
Top Menu	6
Bottom Menu.....	6



INITIAL LOG IN

1. Open e-mail and click “Set New Password” link. The link expires after 72 hours. If expired, contact your service team for a new link.



2. Enter a new password based on the following security requirements and click “Set Password”.

<p>Please set a new password for: aohman@meristemfw.com</p> <p>New Password</p> <input type="password"/>	<p>Passwords must meet the following requirements:</p> <ul style="list-style-type: none">• Passwords must not contain your email address or parts of your full name that exceed two consecutive characters.• Passwords must be at least 8 characters and must contain characters from three of the following four character categories:<ul style="list-style-type: none">◦ Uppercase letters (A - Z)◦ Lowercase letters (a - z)◦ Numbers (0 - 9)◦ Non-alphanumeric (For example: !, \$, #, or % etc.)
<p>Confirm Password</p> <input type="password"/>	
<p>SET PASSWORD</p>	

3. Enter e-mail and password again to sign in and then click “I agree” on the screen that follows.

SIGN IN

Email:

Password:

Remember me on this computer

SIGN IN

Did you forget your password? [Recover it here.](#)



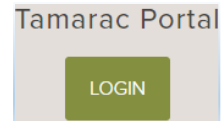
FORGOT PASSWORD

1. If you forgot your password, go to Meristem’s website – www.meristemfw.com

2. Click “Client Login” at top right of page



3. Click “Tamarac Portal Login” at bottom of “Client Login” page



4. At the bottom of the “Sign In” screen, click “Recover it here”

SIGN IN

Email:

Password:

Remember me on this computer

SIGN IN

Did you forget your password? [Recover it here.](#)

5. Enter your e-mail address on the “Request Password Reset” screen

REQUEST PASSWORD RESET

To reset your password, type the email address associated with your account and click Reset Password. We will send an email with reset instructions.

Email:

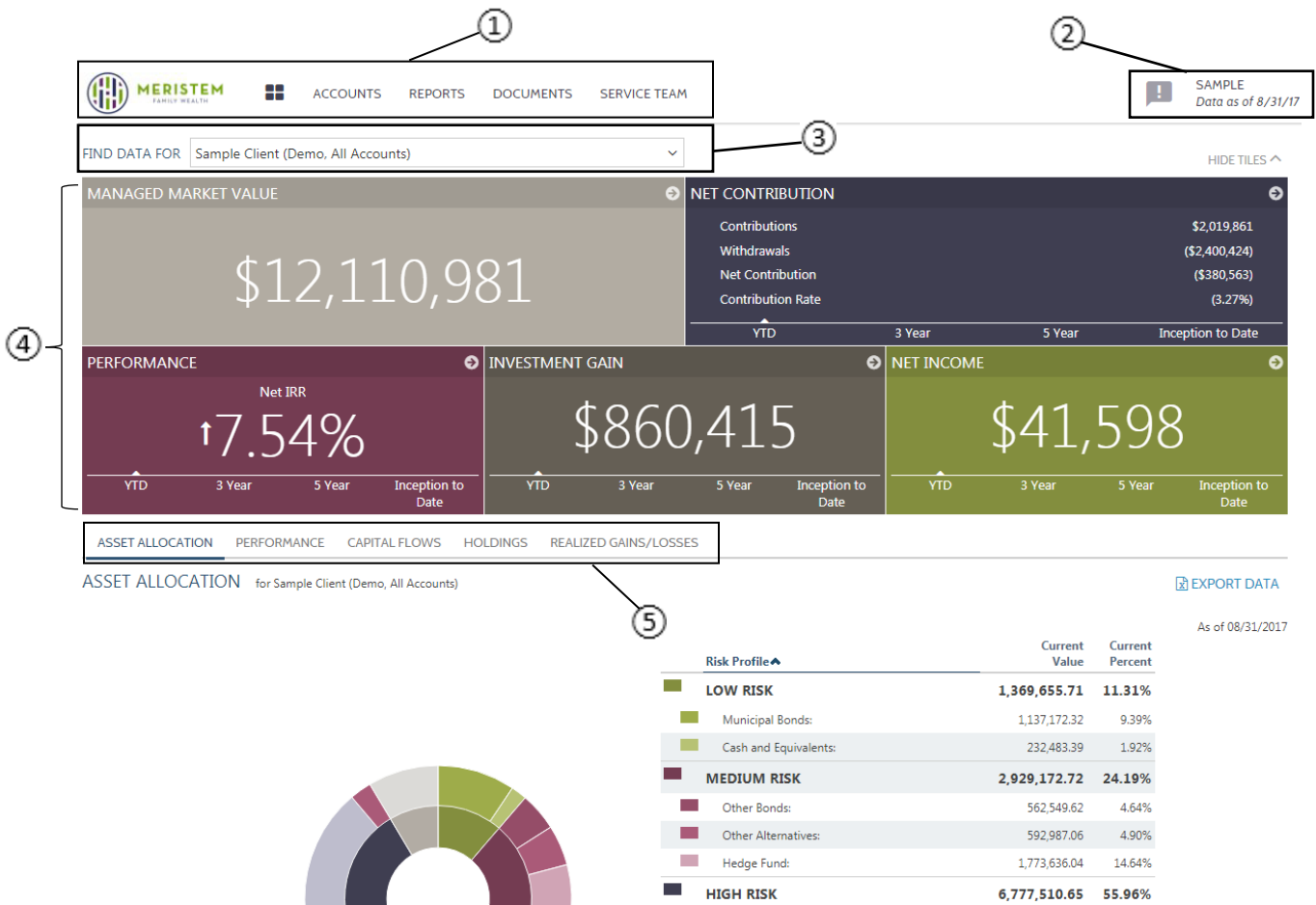
RESET PASSWORD



DASHBOARD PAGE OVERVIEW

The dashboard page is the first thing you'll see when you log into the new portal, which includes a quick snapshot of key portfolio data and a few different ways to navigate to more detailed reporting. Here is a quick look at five key sections of the dashboard:

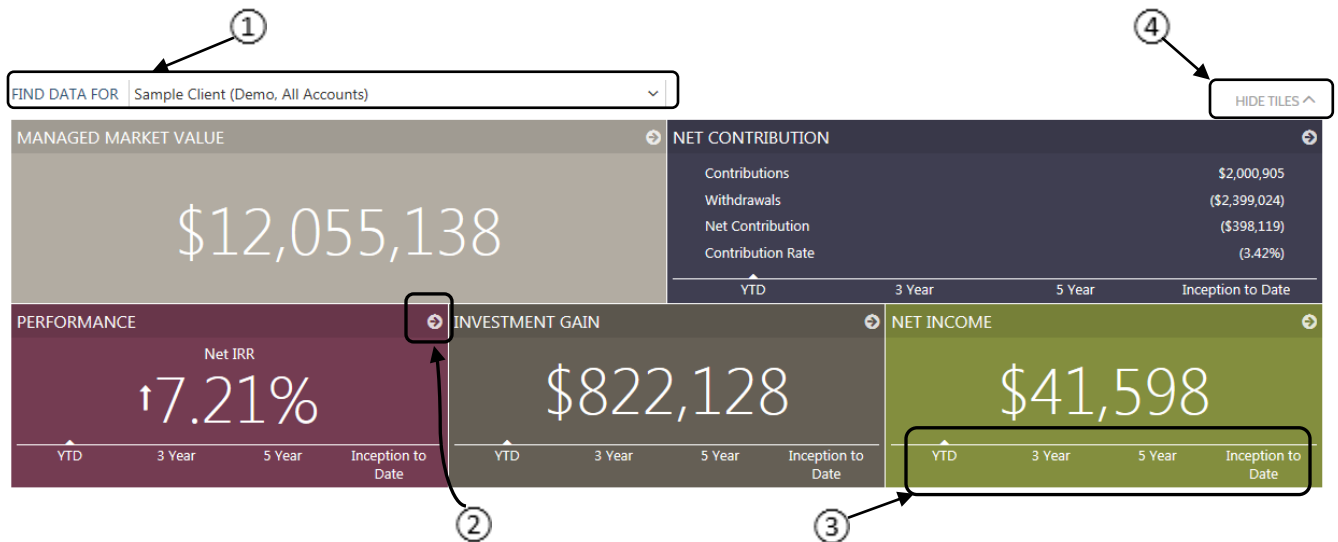
1. Top Menu – Navigate to home page or directly to accounts, reports, documents, and service team
2. Announcements, Date, & Logout – View announcements, date of portfolio data; also log out here
3. “Find Data For” – Select the group or account to view (default to “All Accounts”)
4. Dashboard Tiles – A snapshot view of portfolio metrics
5. Bottom Menu – Toggle between five interactive reports



DASHBOARD TILES


The dashboard tiles are a good starting point for a quick snapshot of your current portfolio value, returns, and activity over multiple time periods. You'll quickly learn that the site is dynamic, with many active links, including the dashboard tiles themselves.

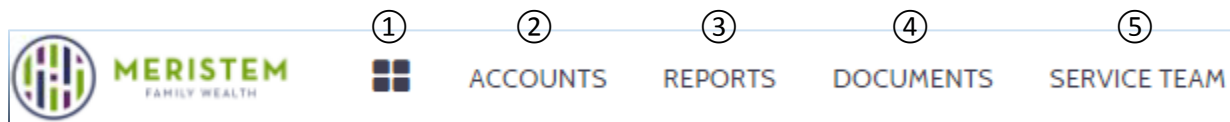
1. Click the "Find Data For" drop down menu to select a reporting group ("All Accounts") or a specific account within the total portfolio.
2. Click the arrow at the top right of each tile to navigate to more detailed underlying reporting.
3. Select your preferred reporting period within any given tile.
4. Or click "Hide Tiles" to make way for detailed reports located at the bottom of the dashboard screen.



TOP MENU

Utilize the menu at the top of the dashboard page to navigate directly to the following:

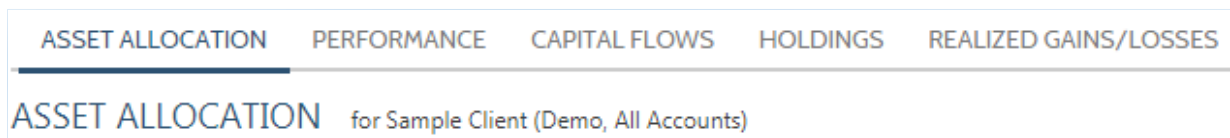
1.  – Click this button to return to home dashboard screen at any time
2. Accounts – View your list of accounts and groups
3. Reports – Select from a list of performance, holdings, and transaction reports
4. Documents – Vault for document storage, including quarterly reports
5. Service Team – Contact information for your service team




BOTTOM MENU

Utilize the menu at the bottom of the dashboard page to toggle between the following interactive reports (also available within the “Reports” section of the top menu):

1. Asset Allocation – Sorted by risk profile and asset class
2. Performance – Includes interactive performance graph since inception and table of asset class returns
3. Capital Flows – Graph of account value vs. net investment and table with capital flows
4. Holdings – Detail of portfolio holdings, including value, cost, unrealized gain/(loss), and weight
5. Service Team – Contact information



USER TIPS: There are a variety of interactive features in each report, including sorting, expanding, and focusing in on certain elements of the portfolio and performance. For example, select the Asset Allocation tab and hover over the pie chart or table to highlight a risk bucket or asset class.

Further, toggle over to the Performance tab and you’ll find an interactive performance graph. Hover over the graph, left click with your mouse and drag to the right, then release. The chart will zoom in on the specific period time period you selected. Click the  at the top left of the chart to zoom back out.