

GETTING STARTED

GUIDE: *Clients*



What is BlueLeaf?

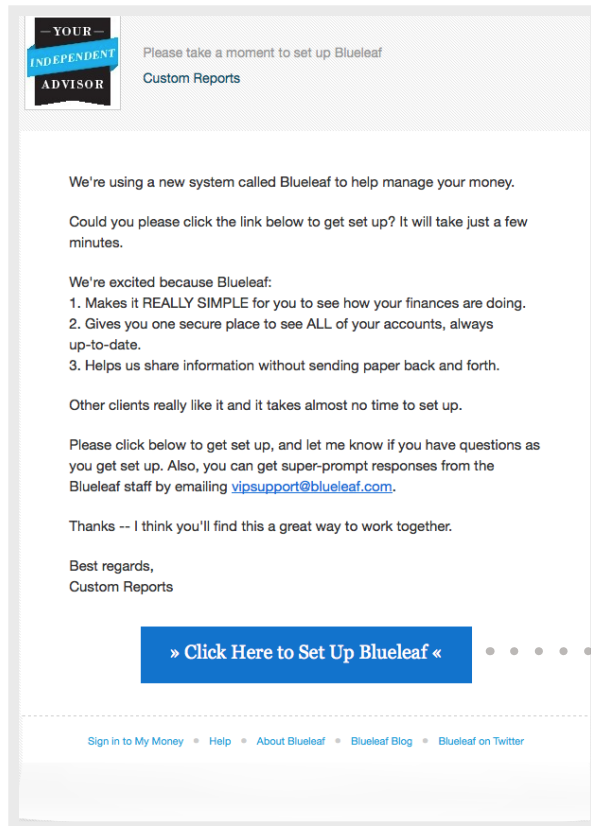
Blueleaf simplifies tracking all your savings and long-term financial goals while making everything you own transparent, understandable, and controllable.

- See all your accounts in one, secure place. Achieve your goals faster by seeing how all your accounts work together.
- Collaborating with your family and advisor. Settings allow you to control what others have access and control over.
- Complete transparency into every single account and investment. See what you're actually invested in.
- BlueLeaf works with thousands of financial institutions to update your account information automatically and securely.

Important Note: *For full interactivity on this pdf, you must be connected to the internet and using Adobe Reader 11.0 or higher. To download the free software, please go to <http://www.get.adobe.com/reader/>.*

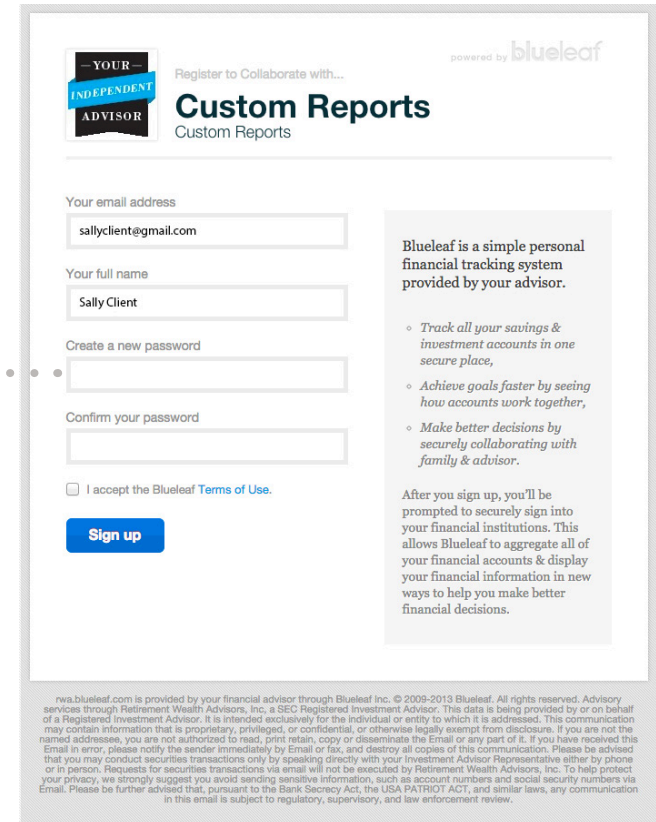
How Do I Get Started?

1 You will receive an invitation via email from your Financial Advisor inviting you to join BlueLeaf. The email will look like this:



Click this Button to Set-Up BlueLeaf

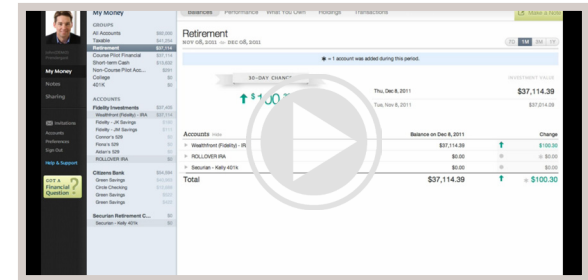
2 You will be taken to a screen asking you to create a new password for your BlueLeaf Portal.



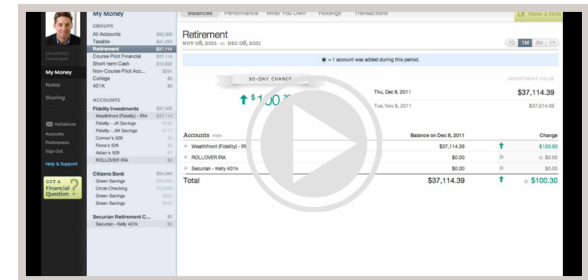
Enter a Password, Confirm it, and Click **Sign-Up**

- Once you have signed up, you will be taken directly to the BlueLeaf website. Please watch the videos below to become familiar with the functions and features of your new BlueLeaf Account.

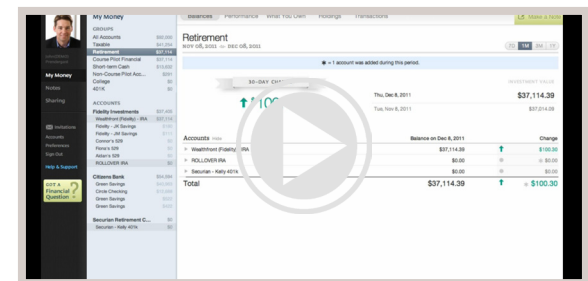
How Do I View My Balances & Performance?



How Do I View My Allocations & Holdings?



How Do I Share Information From My BlueLeaf Account?



FormulaFolio Investments, LLC ("FFI") is a Registered Investment Advisor with the SEC (Securities and Exchange Commission). All written content in this publication is for information purposes only and was provided by BlueLeaf Wealth, Inc., a third party technology provider and FormulaFolio Investments, LLC. BlueLeaf Wealth, Inc. and FormulaFolio Investments are not affiliated.