

# VIEWING YOUR iPLAN GROUP ACCOUNT ONLINE

## Changing Your Username and/or Password

- 🔑 Click on the "Security" tab at the top of the page and follow the prompts. Press "finish" once complete.
- 🔑 Both your Username and Password must contain at least 1 uppercase letter, 1 lowercase letter and 1 numeric character.

## Viewing Details on Your Account

The following options can all be accessed through the **"Reports" tab** at the top of the page:

### Portfolio Valuation

- 🔑 This page will reflect the value of your investments by cash and asset type. IE: If you own two separate real estate properties, one valued at \$100k and one at \$50k, this page will show you a total combined value of real estate at \$150k.

### Portfolio Allocation

- 🔑 Similar to the Portfolio Valuation, this page will reflect your cash and assets by asset type. In addition to the market value, you will also see your asset allocation by percentages, as well as a visual pie chart.

### Equity Allocation by Industry

- 🔑 This page does not apply to Self-Directed accounts. Please disregard this page.

### Transactions by Month

- 🔑 This page will reflect your cash transactions by month, such as contributions, distributions, investment payments, investment funding purchases etc. You will be able to see the date of payment, payment type, payment amount etc.
- 🔑 View previous months by clicking on the "Previous" button at the bottom of the page.

### Transaction Summary

- 🔑 This page will allow you to easily view all cash transactions within your account for the current year, by transaction type (IE: Contribution) and dollar amount.
- 🔑 You may view details on a specific transaction by clicking on the transaction.

### Investment Summary

- 🔑 Here you will see a summary of your investment holdings by asset type.
- 🔑 To view individual assets held within a specific investment category, click on an asset type. (IE: Click on "Limited Liability Company" to view each of your LLC investments.)
  - Once there, you may click on an individual asset to view recent transactions for that specific asset.

### Historical Statements

- 🔑 This page will allow you to view your Quarterly Account Statements. Simply click on the statement you would like to view, and it will open a PDF. From there you can view, print or save your statement.