

# Asset-Map Client Portal

Welcome to your Asset-Map client portal!

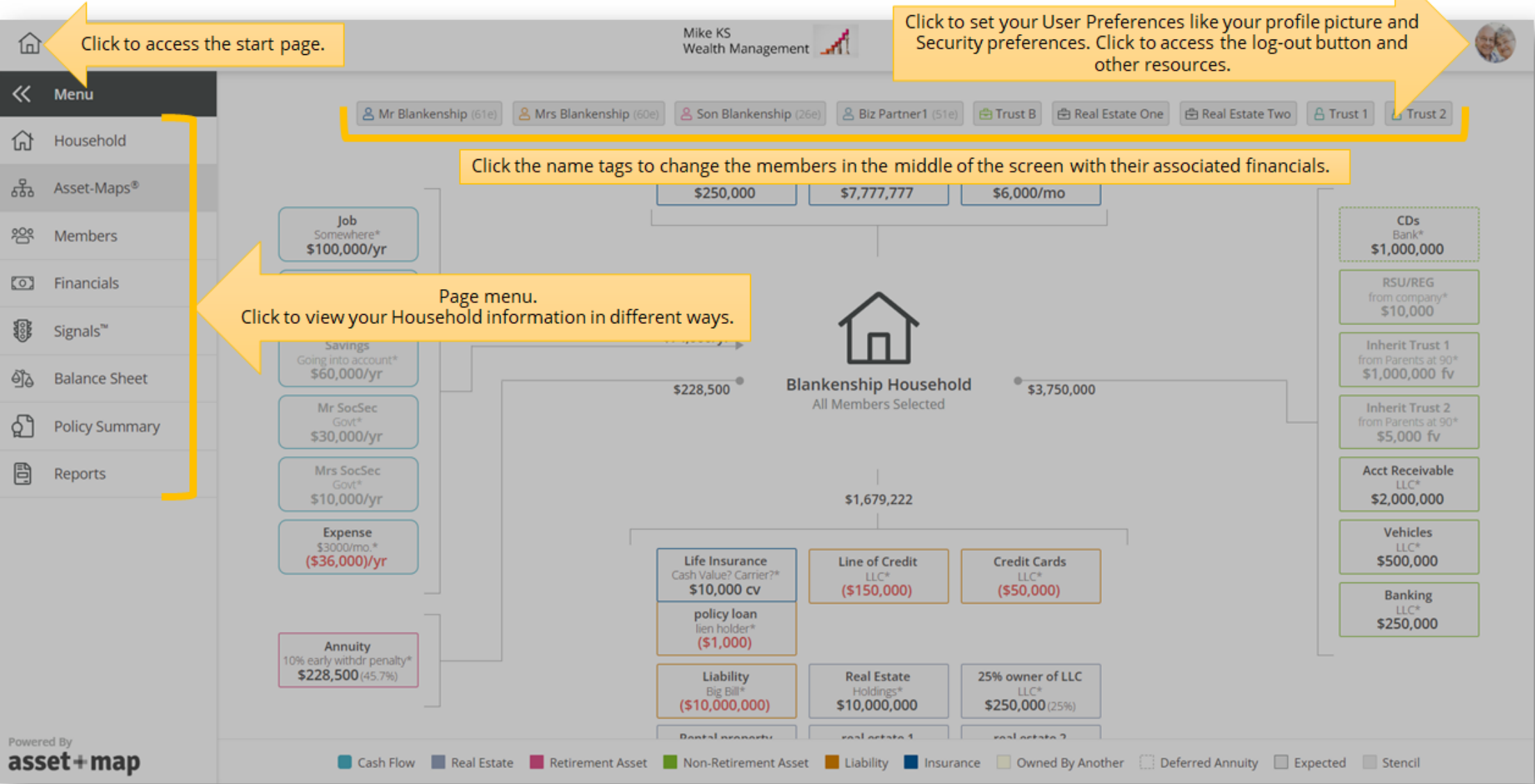
This document is provided to you to assist you in navigating your Asset-Map Client Portal.

If you need support, have any questions or updates to your household, please reach out to your Financial Professional.

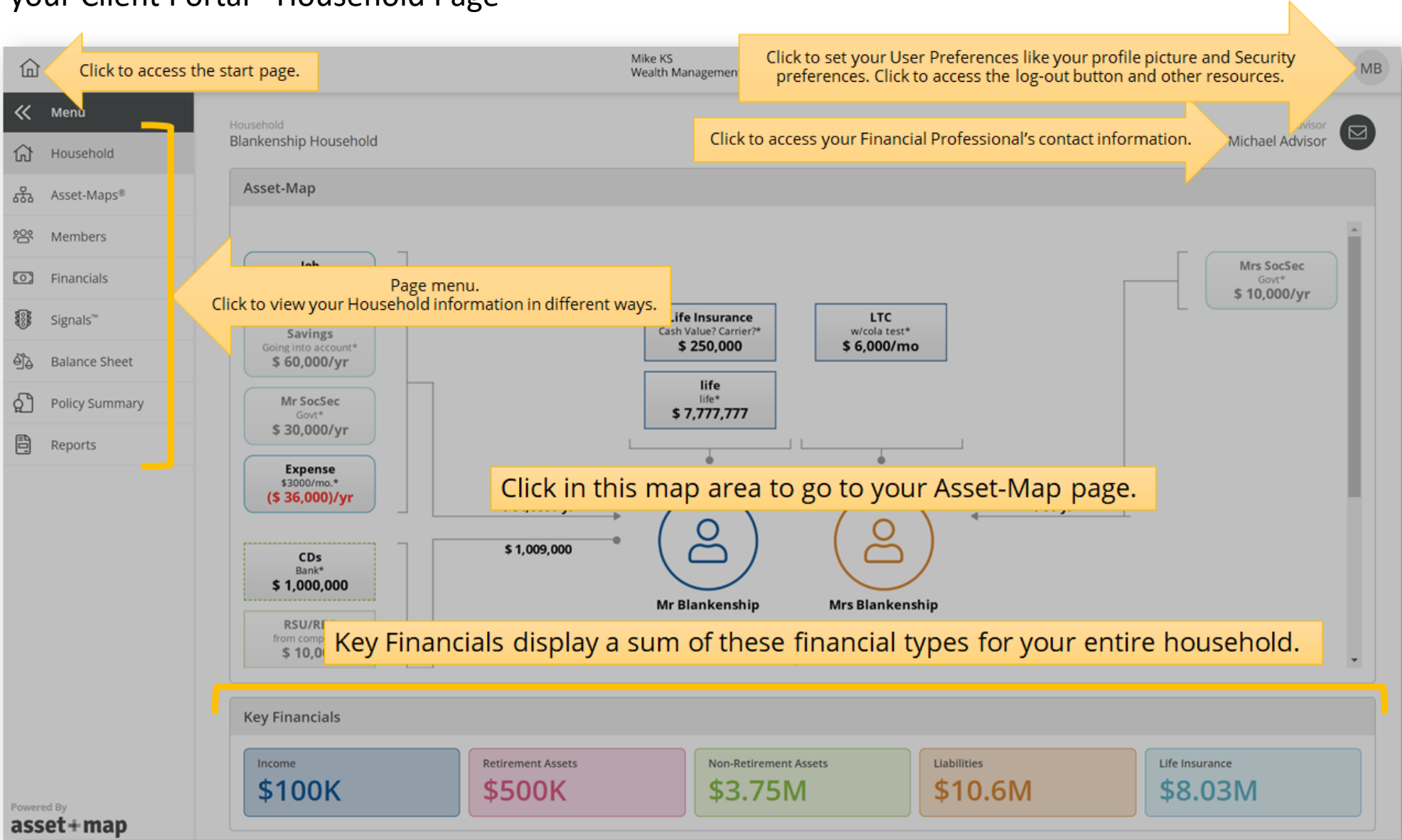
Thank you!

Please note, the information presented on these pages or on your client portal is intended solely for viewing and informational purposes. It is not intended to provide personalized financial advice, recommendations, or guidance. Before making any financial decisions, it is essential that you consult with your financial advisor or professional.

# Navigate your Client Portal - Asset-Map Page



# Navigate your Client Portal - Household Page



## Navigate your Client Portal - Signals™ Page

The screenshot displays the 'Signals™' page in a client portal. The top navigation bar includes a home icon, the user's name 'Mike KS Wealth Manager', and a user profile icon labeled 'AS'. A yellow arrow points to the home icon with the text 'Click to access the start page.' The left sidebar contains a 'Menu' with icons and labels for 'Household', 'Asset-Maps®', 'Members', 'Financials', 'Signals™' (highlighted), 'Balance Sheet', and 'Policy Summary'. A yellow arrow points to the 'Signals™' menu item with the text 'Page menu.' The main content area is titled 'Signals™' and includes a descriptive paragraph: 'Asset-Map Signals are an indicator for the financial preparedness of a household to fund a sustained loss associated with critical events that commonly disrupt financial security. The following indications are to be used to identify potential scenarios that require attention and is not intended to provide financial advice or recommendation of action. Each indication should be explored and confirmed by a professional to determine the unique circumstances of every household.' Below this, there are six signal cards: 'Liquidity' (green checkmark), 'Long-Term Disability' (red X), 'Loss of Life' (green checkmark), 'Long-Term Care' (green checkmark), 'Longevity' (green checkmark), and 'Legal Liability' (yellow warning triangle). A large yellow arrow at the top right points to the user profile icon with the text 'Click to set your User Preferences like your profile picture and Security preferences. Click to access the log-out button and Support resources.'

Click to access the start page.

Click to set your User Preferences like your profile picture and Security preferences. Click to access the log-out button and Support resources.

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Asset-Maps®

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Signals™

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### Signals™

Asset-Map Signals are an indicator for the financial preparedness of a household to fund a sustained loss associated with critical events that commonly disrupt financial security. The following indications are to be used to identify potential scenarios that require attention and is not intended to provide financial advice or recommendation of action. Each indication should be explored and confirmed by a professional to determine the unique circumstances of every household.

**Liquidity**  
Preparedness to fund a short-term demand for cash equal to base number of months of replacement income.

**Long-Term Disability**  
Preparedness to fund a sustained long-term loss of earned income due to disability.

**Loss of Life**  
Preparedness to replace a permanent loss of earned income due to premature death.


**Long-Term Care**  
Preparedness to fund a long-term care event for the primary members.

**Longevity**  
Preparedness to fund long-term demand for sustainable income due to longevity.


**Legal Liability**  
Preparedness to fund a legal liability attack on assets.

Page menu.


Navigate your Client Portal - Balance Sheet Page




Click to access the start page.




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
Mike KS  
Wealth Manager


Click to set your User Preferences like your profile picture and Security preferences. Click to access the log-out button and Support resources.





Balance Sheet


Select member(s) to see and overview of matching financials


 All


 Mr Blankenship (61e)


 Mrs Blankenship (60e)


 Son Blankenship (26e)


 Biz Partner1 (51e)

 Trust B

 Real Estate One

 Real Estate Two

 Trust 1

 Trust 2

Name

Location

Collected

Mrs Blankenship

Son Blankenship

Biz Partner1 (51)

Trust B

Real Estate One

Annuity

10% Early Withdr  
Penalty

10/04/2023

-

-

\$74,000

\$52,500

\$89,500

\$12,500

Total Retirement Assets

\$0

\$0

\$74,000

\$52,500

\$89,500

\$12,500

Non-Retirement Assets

Name

Location

Data Collected

Mr Blankenship

Mrs Blankenship

Son Blankenship

Biz Partner1 (51)

Trust B

Real Estate One

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Navigate your Client Portal - Policy Summary Page

Click to access the start page.

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Mike KS  
Wealth Manager

Click to set your User Preferences like your profile picture and Security preferences. Click to access the log-out button and Support resources.

Policy Summary

Select name tags

All

Mr Blankenship (61e)

Mrs Blankenship (60e)

Son Blankenship (26e)

Biz Partner1 (51e)

Trust B

Real Estate One

Real Estate Two

Trust 1

Trust 2

☒ Life Insurance

☒ Disability Insurance

☒ Long-term Care Insurance

☒ Property & Casualty

Insurance


Reference Name	Carrier	Policy Date	Nickname	Insured	Owner	Beneficiary	Policy Type	Curr Premium	Prem Mode	Data Collected	Acc. Value	Cash Surr. Value	Face Amount
Life Insurance*	Cash Value? Carrier?	N/A	-	Mr Blankenship	Mr Blankenship	Mrs Blankenship Son Blankenship	Universal Life	\$0	Annual	04/19/2023	\$10,000	\$0	\$250,000
Life*	Life	N/A	-	Mr Blankenship	-	-	Universal Life	\$0	Annual	12/05/2023	\$0	\$0	\$7,777,777
								\$0 / Yr			\$10,000	\$0	\$8,027,777


Disability Insurance


Reference Name	Carrier	Policy Date	Nickname	Insured	Owner	Beneficiary	Policy Type	Curr Premium	Prem Mode	Data Collected	Elimination Period	Benefit Period	Benefit
There are no Disability Life Insurances available for this household.													




Navigate your Client Portal – Shared Reports Page


 Blankenship Household


Mike KS  
Wealth Management 





<< Menu


 Household


 Asset-Maps®


 Members

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 Signals™

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 Policy Summary

 Reports

Shared Reports

The following PDF reports have been shared with you by your advisor. Click download to view the PDF.

Reports shared by your advisor for download.

Report Type	Shared Date	
 Asset-Map Report	Tuesday, Jan 9th 2024	345 kB 

Page menu.

Click to download report.

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