

A photograph of three business women sitting around a wooden conference table in a modern office setting. The woman on the left, with long dark braids and wearing a white shirt, is gesturing with her hands while speaking. The woman in the center, with short grey hair and wearing a grey button-down shirt, is looking at the speaker and has her hands clasped. The woman on the right, with dark curly hair and wearing an orange blouse, is also looking towards the speaker. On the table are a laptop, a white coffee cup, a smartphone, and some papers.

CIRStatements Investor Guide

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How to Log In

Our current login process is migrating to Microsoft Azure, a platform that requires two-step, also known as two-factor, verification. This standardized login process uses your email address as a unified login ID, fortifies your data integrity, and enhances your user experience across all our applications and the Wove platform.

Once you create a user profile and provide login credentials, all subsequent logins will use the two-step process across applications and firms. This guide will help you establish the user profile and credentials for the unified login process.

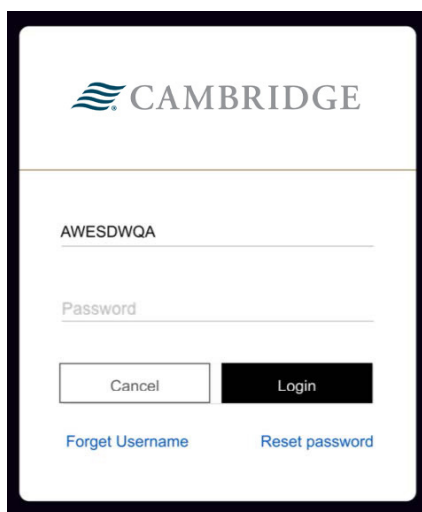
Step 1: For Investors: Navigate to cirstatements.com. It is recommended to clear cache and remove old bookmarks directing to this URL before beginning the process.

When you open the application, you will see the following screen. Enter the login ID used previously to access the Albridge system.



The image shows a login screen for Cambridge. At the top is the Cambridge logo. Below it is a label "Login ID" followed by a text input field. Under the field is a checkbox labeled "Remember my login ID". Below the checkbox is a black button with the word "Continue" in white. At the bottom, there is a link that says "Need help logging in?".

Step 2: Enter your password and click **Login**.



The image shows a login screen for Cambridge. At the top is the Cambridge logo. Below it is a text input field containing the text "AWESDWQA". Below this field is a label "Password" followed by another text input field. Below the password field are two buttons: a white "Cancel" button and a black "Login" button. At the bottom, there are two links: "Forgot Username" and "Reset password".

NOTE: If you cannot remember your login ID, just enter what you think it might be, and the system will direct you to the screen in Step 2, where you can click **Forgot Username**. If you cannot remember your password, click **Reset Password**.

Each hyperlink will bring you to the appropriate screen, where you can fill out the necessary information and then click **Send Me Username** or **Reset Password**, depending on your need. Upon completion, you will be redirected to the log-in page shown in Step 1.

Step 3: Once you have logged in, the system will redirect you to a screen to set up your new username and password. **Your email will be your new username.**

Choose a password of 8-16 characters. Make sure that it includes at least three of the following:

- Uppercase letter
- Lowercase letter
- Number (0 -9)
- Special character, such as @, #, \$, etc.

Set up 2-Step Verification

Let's keep your information secure. The phone number and email address you enter here will be used for all subsequent logins and 2-step verification.

1 Verification code will be sent to the email you have listed

Name*

Suffix / Designation*

Email* (This will be your new login ID)

Mobile Phone

New password*

Confirm new password*

Password requirements:

- 8-16 characters
- Include at least three of the following:
 - A uppercase letter
 - A lowercase letter
 - A number (0-9)
 - A special character @ # \$ etc.

Step 4: Click **Save and send code** at the bottom left of the page.

Save and send code

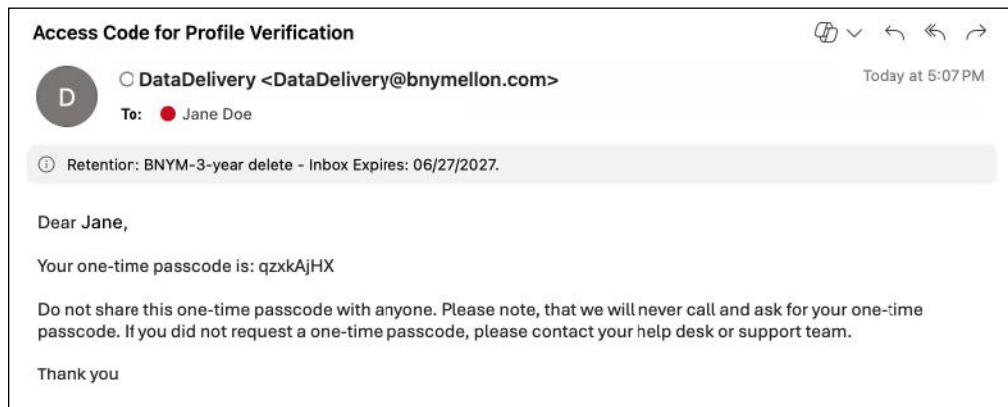
Step 5: The system will notify you that a verification email has been sent to the email account you listed in the previous page.

Email Verification Code Sent

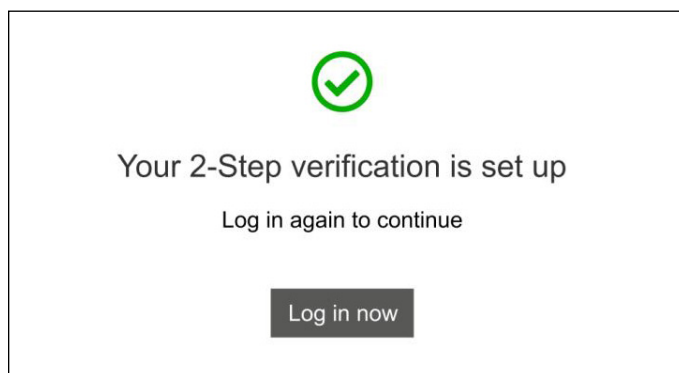
Check your email and enter your verification code. Code sent to Jane.Doe@Company.org

Verification code [Resend code](#)

Step 6: Check your email for a one-time passcode. Then enter the code in the box outlined in red in the figure above. Click **Continue**.



Step 7: A screen noting that your two-step verification has been set up will prompt you to log in again. Click **Log in now**.

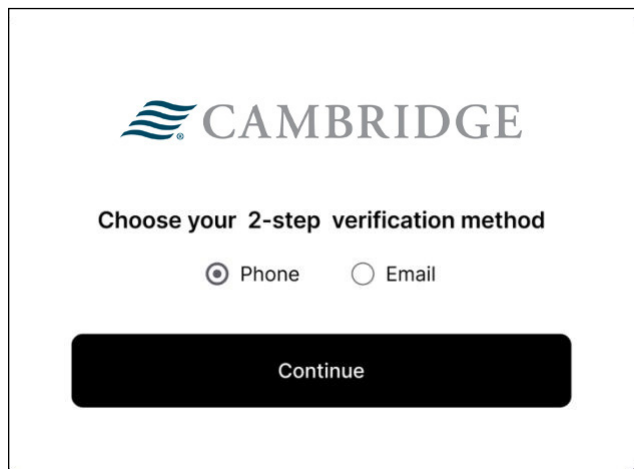


Step 8: When you reach this screen, the URL at the top of the page should now begin with login.woveplatform.com. Enter your password and your login ID, which is your email, and then click **Log in**.



NOTE: Should there be an error, the system will show a message asking you to try setting up two-step verification again. Just click **Try again**, and you will be redirected to the login page, where you can begin setting up your two-set authentication.

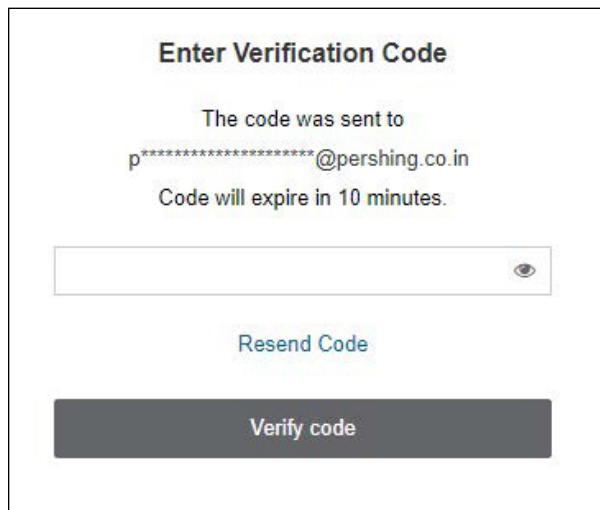
Step 9: The system will ask whether to send the verification code to your email or via a text. Choose an option and then click **Continue**.



The screenshot shows the Cambridge logo at the top. Below it, the text "Choose your 2-step verification method" is displayed. There are two radio button options: "Phone" (which is selected) and "Email". At the bottom, there is a large black button labeled "Continue".

Step 10: Check your email or text messages for the verification code.

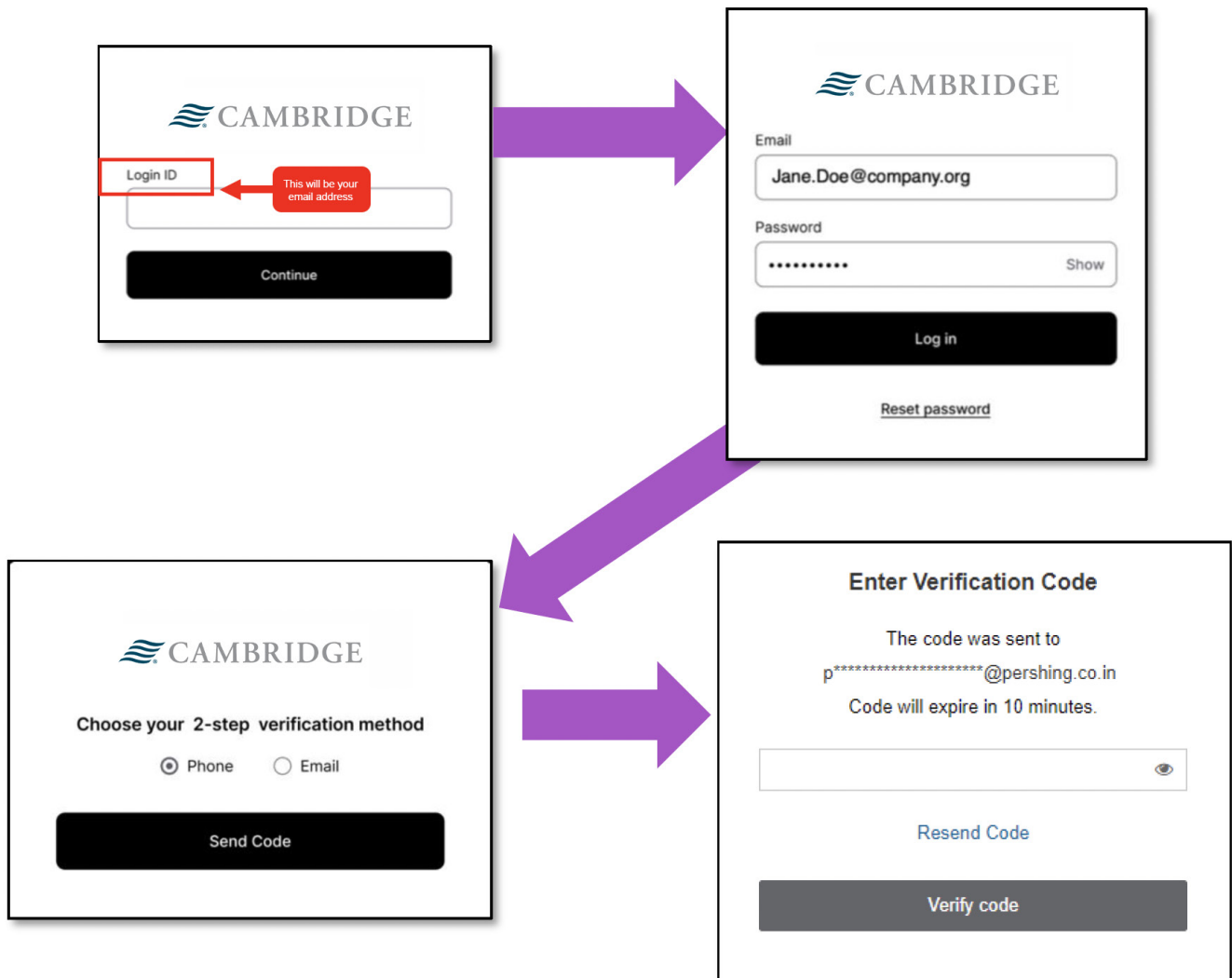
Step 11: Enter the verification code in the spaces provided and click **Verify Code**. If you cannot find the code, click **Resend code** and retry.



The screenshot shows the "Enter Verification Code" screen. It displays the text "The code was sent to" followed by a masked email address "p*****@pershing.co.in". Below this, it says "Code will expire in 10 minutes." There is a text input field for the code, a "Resend Code" link, and a large grey button labeled "Verify code".

Step 12: You will land on your home page from which you can navigate through the Wove Reporting application.

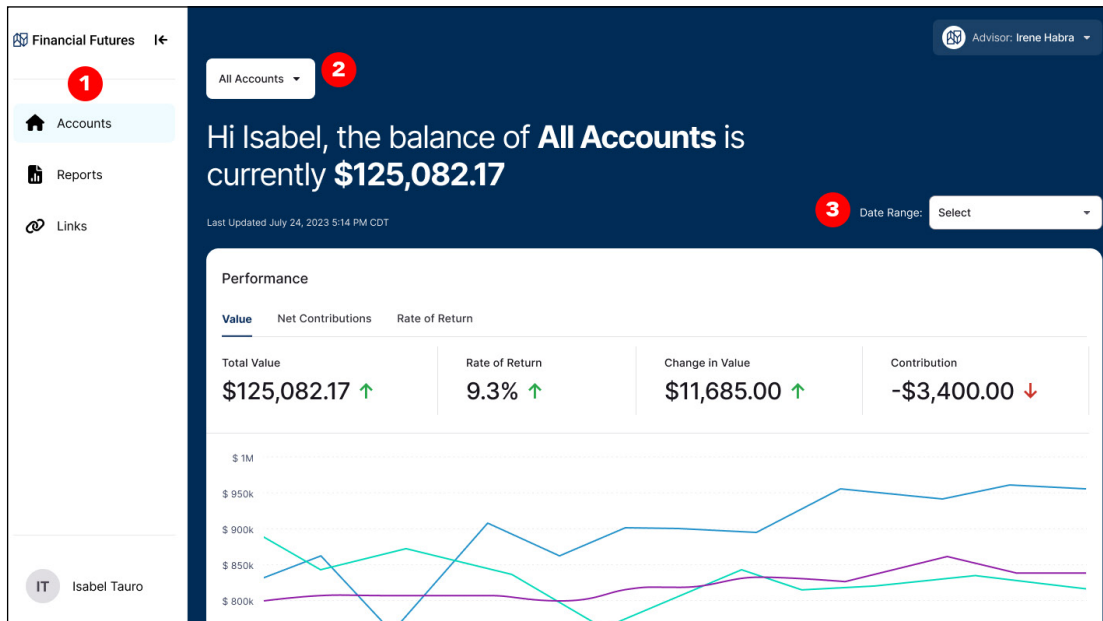
NOTE: After you have set up multi-factor authentication, each time you open the application, the following flow will be how you log in.



CIRStatements Landing Page

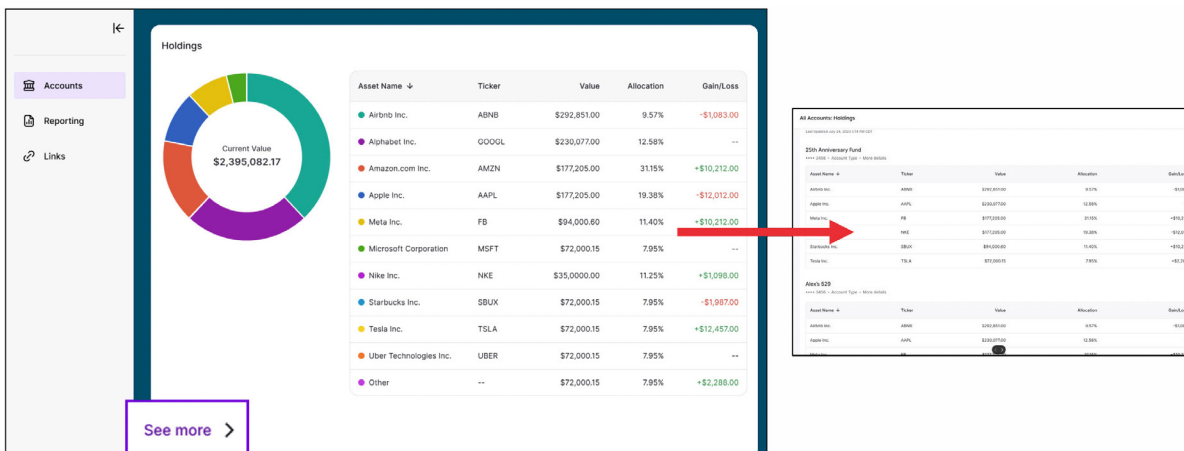
After logging in, you will land on the Accounts landing page where you will see:

1. A side navigation menu for **Accounts**, **Reporting**, and **Links**
2. A dropdown menu that displays each of your **Accounts** and **Groups** (formerly known as Portfolios)
3. The option to select a **Date Range** to view account data



After clicking **Accounts** from the navigation menu, you can scroll down to see an overview of **Holdings**, **Asset Allocation**, and **Activity**. Drill down and view more data on the Holdings and Activity by clicking **See more** in the bottom left corner of each section.

NOTE: You can do this for each individual account.



How to View Individual Accounts

Step 1: From the landing page, scroll down in your dashboard to view individual accounts.

Step 2: Click on an account to open a dashboard page for that individual account.

NOTE: This screen will look like your overall accounts page. You can tell at the top of the page if you are viewing one individual account or your whole portfolio.

In addition to scrolling through your dashboard, you can click the Accounts drop down at the top of the page, from here you can click on individual accounts and the system will take you to the dashboard page for that account.

How to View Groups (formerly known as Portfolios)

Step 1: If you have accounts grouped together, you can view those groups by clicking on the **Accounts** drop down at the top of the page.

Step 2: A window will open where you can click on **Groups**.

Step 3: Click on a group to access its specific dashboard.

Accounts and Groups

X

Accounts

Groups

All Accounts	\$1,022,698.95
IND	\$411,387.35
IRA	\$508,509.79
ITOD	\$102,801.81

How to View and Run Reports

To view and run reports click **Reporting** from the navigation menu.

NOTE: This will open a familiar reporting screen. The functionality remains unchanged, and you will retain access to all the reports you previously had access to.

The screenshot shows the 'Reporting' section of a financial platform. On the left is a navigation menu with 'Accounts', 'Reporting' (highlighted), and 'Links'. The main area is titled 'Reporting' and contains a form for generating reports. The form fields are: Client (Blake Media), Portfolio (Blake Media (Created By FI)), Report / Package (Holdings by Investor), and Date (05 / 26 / 2023). Below the form are 'Preview' and 'Export PDF' buttons. A data protection warning states: 'Protect Your Data: Before saving a report to any device, please ensure that you have password protected the device.' Below the form is a contact information section for Blake Media, including address, phone, and email. At the bottom is a table of holdings.

ASSET	TICKER	QUANTITY	PRICE (\$)	VALUE (\$)
AMERICAN BALANCED FUND CLASS A	ABALX	732.48	29.70	21,754.63
COLUMBIA SELIGMAN COMMUNICATIONS AND INFORMATION FD CL A	SLMCX	673.42	100.68	67,800.13
GEORGE PUTNAM BALANCED FUND CLASS A	PGEQX	453.78	27.00	12,252.11

Personal Profile

Click your name in the bottom left corner to open the **My Information** dashboard.

The screenshot shows the 'My Information' dashboard. On the left is a navigation menu with 'Reporting' and 'Links'. The main area is titled 'My Information' and contains two sections: 'Personal Information' and 'Address'. The 'Personal Information' section has fields for Email, Prefix, First Name, Middle Initial, Last Name, Date of Birth, and Phone. The 'Address' section has fields for Country, City, Address 1, State, and Zip code. A purple arrow points from the 'Isabel Tauro' name in the bottom left corner to the 'My Information' dashboard.

Personal Information

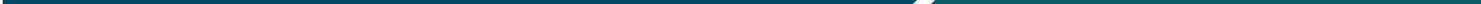
Email	Prefix	First Name
	Ms.	Jane

Middle Initial	Last Name	Date of Birth
S	Done	06/11/1984

Address

Country	City	Address 1
United States	Fairhope	

State	Zip code
Alabama	36532



To find your financial professional contact information, hover over their name in the upper right corner.

All Accounts

Accounts

Reporting

Links

Hi Isabel, the balance of All Accounts currently \$2,395,082.17

Last Updated July 24, 2023 5:14 PM CDT

Performance

Value

Net Contributions

Rate of Return

Your Advisors

CAMBRIDGE

Financial Advisor Services

Phone +1 210-276-7222

Address 175 W 93rd St,
New York, NY 10025

Irene Habra

Primary Advisor

View profile

Jared McDaniel

View profile

Lisa Alfaro

View profile



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