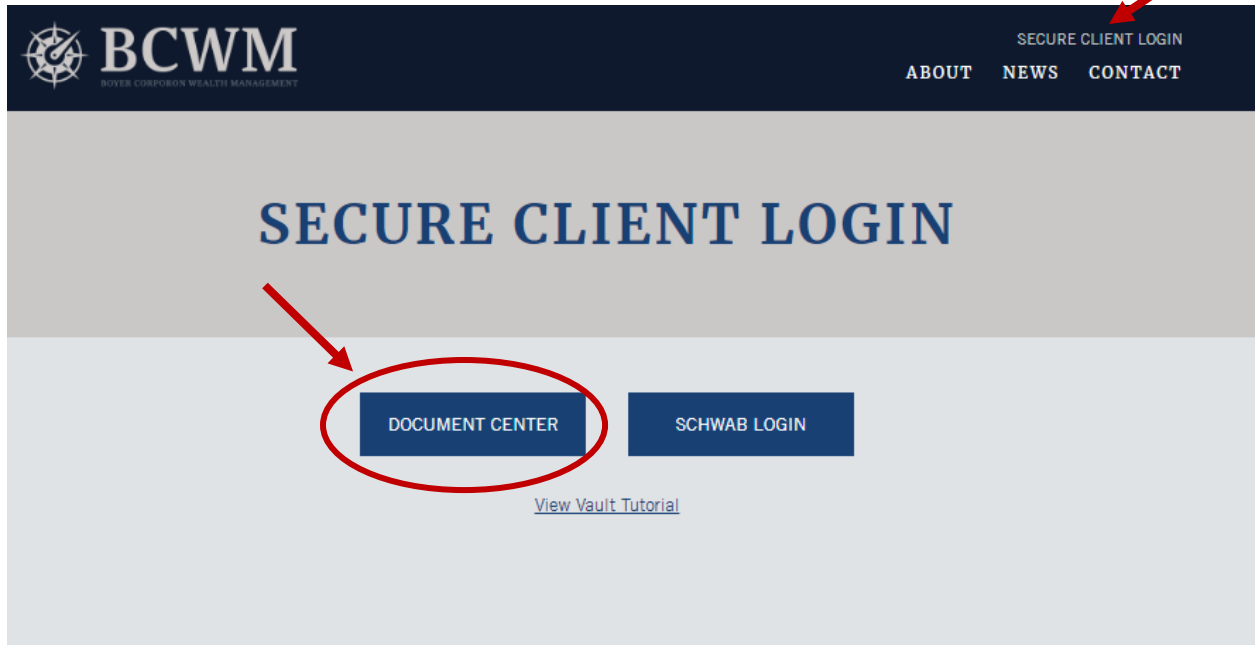




BCWM
Document Center Tutorial

- 1) Click the “Document Center” button from the Secure Client Login section of the BCWM website.



- 2) Enter your username and password (created via the email sent from BCWM), and click the “Login” button. **Passwords are case-sensitive!**

BCWM Document Center Tutorial

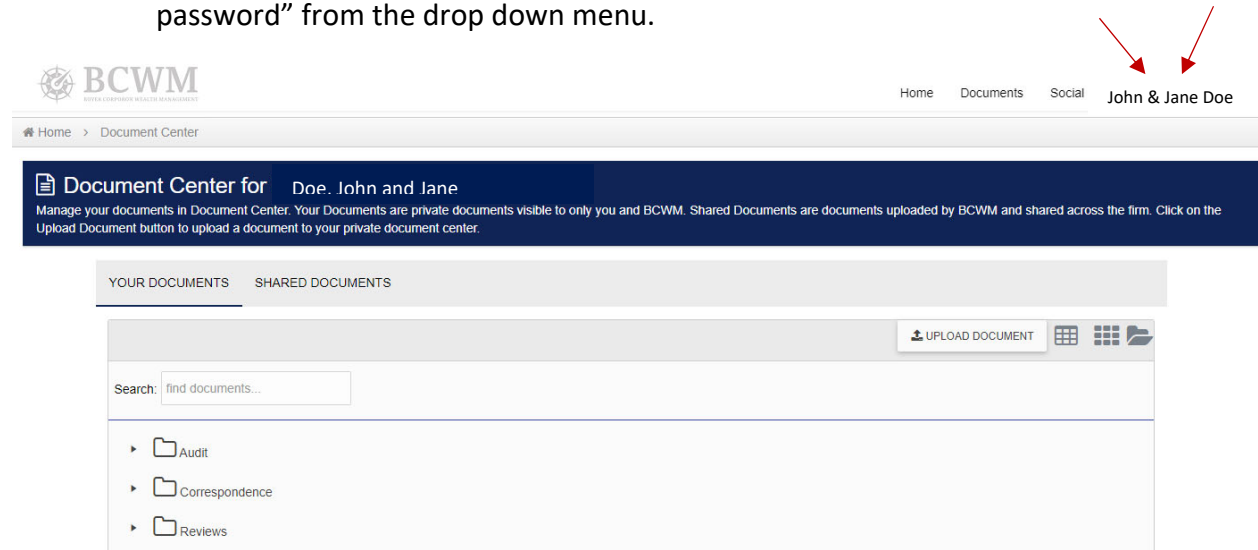
- This is your Document Center Homepage.
1. **View:** these three icons present your documents in 3 different layouts
 2. **Your Documents:** view documents you uploaded to share with BCWM, and view documents uploaded by BCWM (i.e. Wealth Management Reviews)
 3. **Upload Document:** upload documents to share with BCWM
 4. **Search:** find specific documents using keywords
 5. **Shared Documents:** general information from BCWM will be posted in this tab (i.e. Welcome Letter, Investment Commentary, etc.)

The screenshot shows the BCWM Document Center interface. At the top left is the BCWM logo (Business Continuity & Wealth Management). To the right are navigation links: Home, Documents, Social, and John & Jane Doe. Below this is a breadcrumb trail: Home > Document Center. A dark blue banner contains the text: "Document Center for Doe, John and Jane" and "Manage your documents in Document Center. Your Documents are private documents visible to only you and BCWM. Shared Documents are documents uploaded by BCWM and shared across the firm. Click on the Upload Document button to upload a document to your private document center." Below the banner is a navigation bar with two tabs: "YOUR DOCUMENTS" (highlighted with a yellow circle 2) and "SHARED DOCUMENTS" (highlighted with a yellow circle 1). To the right of the tabs is an "UPLOAD DOCUMENT" button (highlighted with a yellow circle 3) and three view icons (grid, list, and another grid). Below the navigation bar is a search bar (highlighted with a yellow circle 5) containing the text "Search: find documents...". To the right of the search bar is a yellow circle 4. Below the search bar is a list of folders: Audit, Correspondence, and Reviews, each with a right-pointing arrow.

BCWM Document Center Tutorial

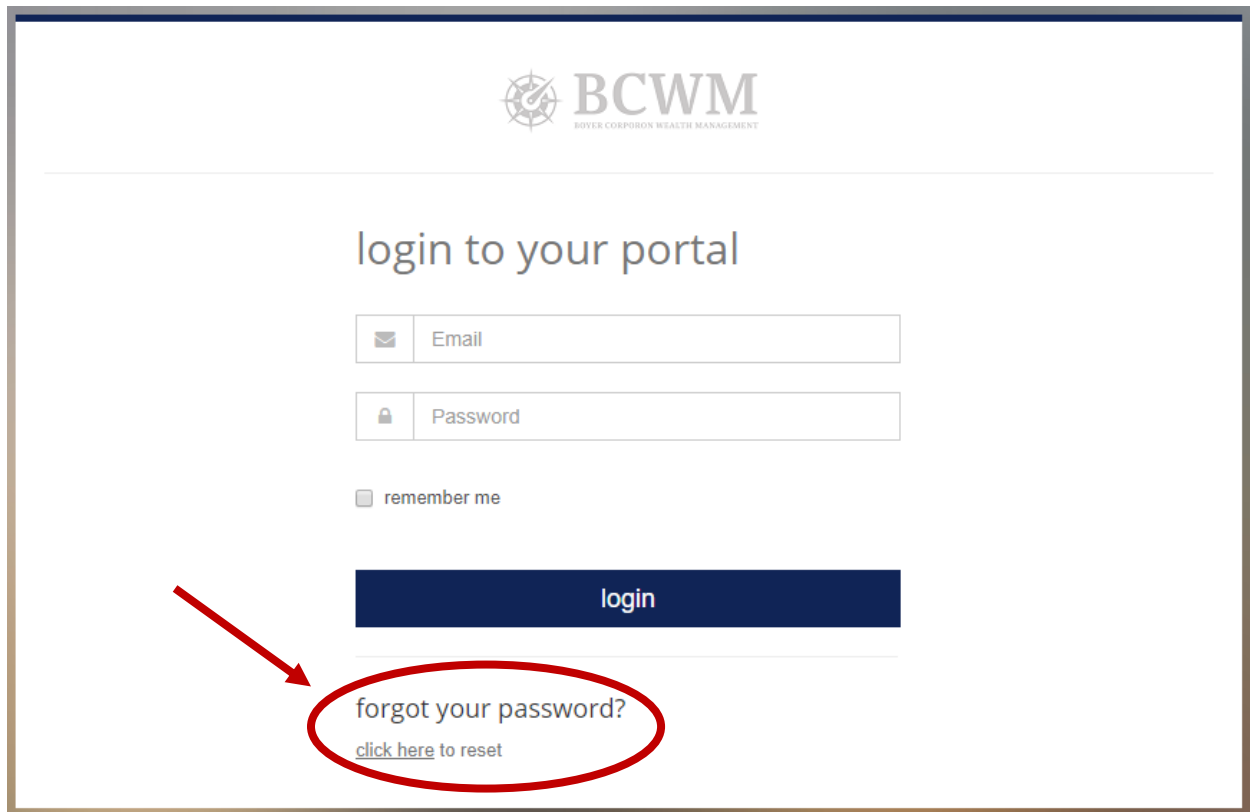
➤ To update your password:

- Click your household name in the upper right-hand corner, and select “update password” from the drop down menu.



The screenshot shows the BCWM Document Center interface. At the top right, the user's name "John & Jane Doe" is displayed, with two red arrows pointing to it. Below the navigation bar, the user's name "Doe, John and Jane" is shown. The main content area has two tabs: "YOUR DOCUMENTS" and "SHARED DOCUMENTS". Below the tabs is a search bar with the placeholder text "find documents...". To the right of the search bar is an "UPLOAD DOCUMENT" button and three icons (grid, list, folder). Below the search bar are three folder icons: "Audit", "Correspondence", and "Reviews".

➤ FORGOT Your Password:



The screenshot shows the BCWM login portal. At the top center is the BCWM logo with the text "BOYER CORPORATION WEALTH MANAGEMENT". Below the logo is the heading "login to your portal". There are two input fields: "Email" and "Password". Below the input fields is a checkbox labeled "remember me". A dark blue "login" button is positioned below the checkbox. At the bottom of the page, the text "forgot your password?" is circled in red, with a red arrow pointing to it. Below this text is a link that says "click here to reset".

BCWM
Document Center Tutorial

- Once you “click here,” type in your email address and click the “reset password” box. Instructions will be sent to that email address and will guide you through resetting your password. **This must be the same email address you initially used when you set up your login credentials.**

modestspark

reset your password

Please enter your Username and click on "reset password".

You'll receive an email from the portal provider with a new password, instructions to login and change the password.

reset password

forgot your username

[click here](#) to retrieve username