

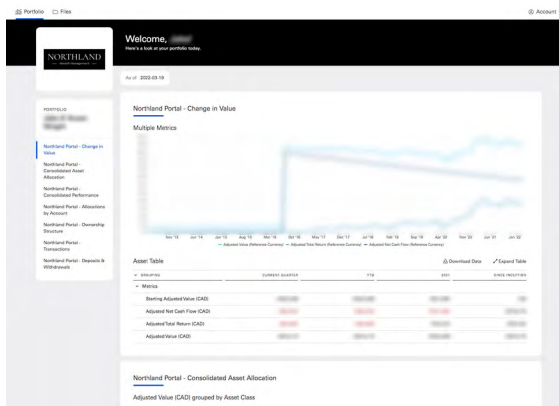
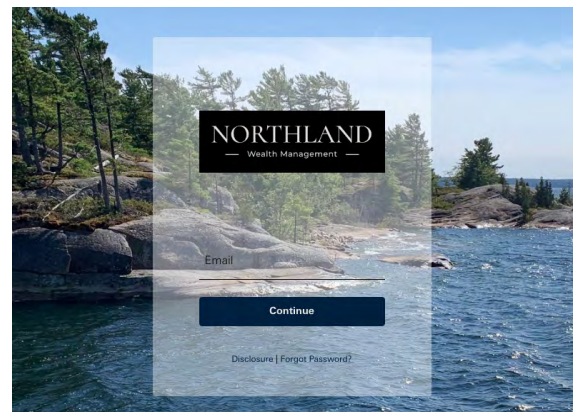
Introduction

Addepar seeks to deliver value beyond just tables and charts. Real-time calculations enable data to be sorted in endless ways and accessed at anytime. The unlimited scalability and tailored experience affords Northland a secure channel to deliver sensitive financial data and documents.

This short guide is designed to accompany clients while navigating the client portal. To help analyze even the smallest transition across a diverse and complex portfolio.

Logging In

- Click on the **Client Login** link on the menu of the Northland website
- Proceed to the Addepar Login screen
- Enter your account information

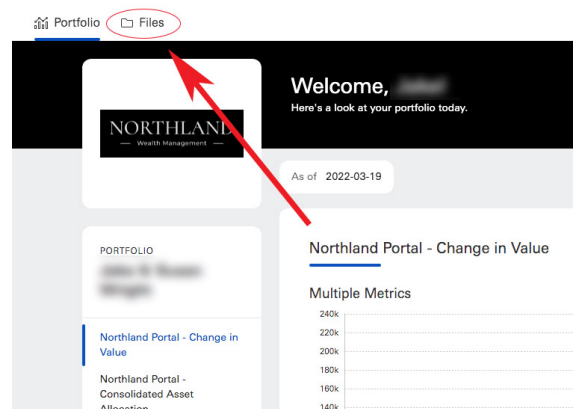


Navigating the Portfolio

- Addepar displays portfolio details in a top-down format and can easily be scrolled throughout
- Navigate easily with the menu on the left
- On mobile: the menu is collapsible and is in bottom right corner – marked with three horizontal bars

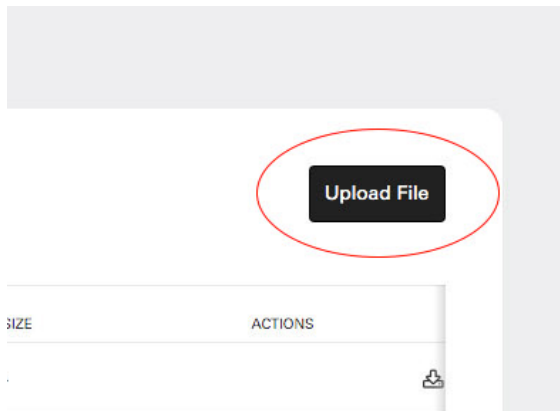
Accessing Files

- Navigate and click on **Files** located in the top left corner marked with a folder icon (Top right on mobile devices)
- Files are stored separately from the portfolio overview
- To return to the portfolio either click back or click **Portfolio** located at the top (Bars and graph icon for mobile devices)



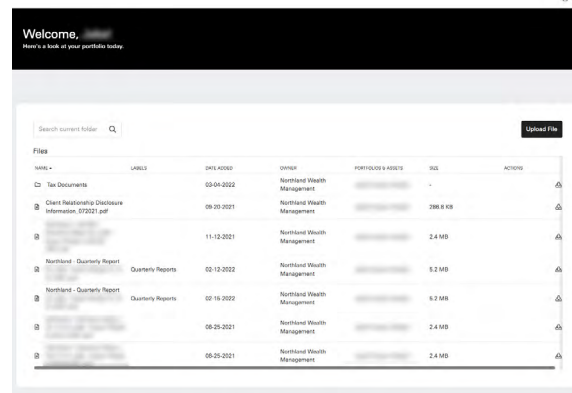
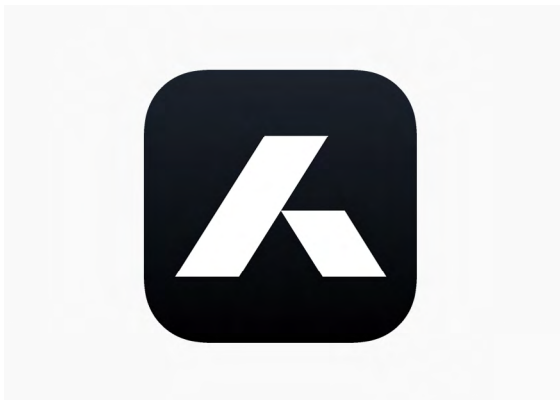
File Directory

- All files shared from Northland will be available in the Addepar Directory
- Currently Addepar shows the date the file was created – Not when new information is added to the directory to the file



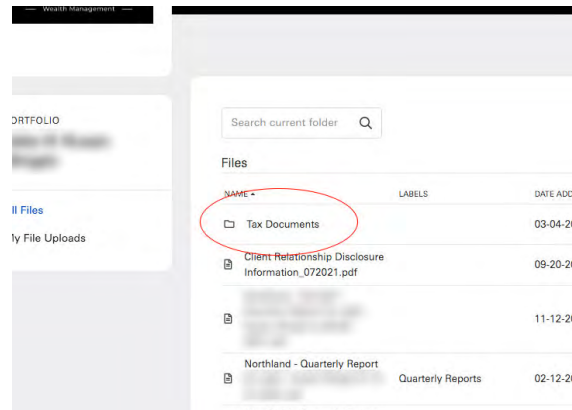
Tax Documents

- Tax documents, when available, have a separate folder within the files directory
- Click on the **Tax Documents** folder to browse all available documents
- To return to the directory click on **Files** directly below the search bar at the top of the file directory



Uploading Files

- Addepar offers a direct secure channel for clients to safely share sensitive files
- Click the **Upload File** button located in the top right corner of the file directory
- Previously shared files will be located in the **My file Uploads** directory located on the menu to the left of the directory



Mobile App

- The Addepar mobile app offers a more generalized mobile experience that is
- Logging into the mobile app follows the same process as logging into the client portal online
- Currently the Addepar mobile app is only available on the Apple iPhone