

## Accessing the Red Feather Financial Client Portal

Red Feather Financial uses a secure cloud-based software called Actionstep to manage your financial matter. Actionstep has a feature called the Portal which is a secure area that allows our clients to access information related to their financial matter. This portal can be used by you to upload any documents we might request. It can also be used by us to place documents that you may download to review.

The portal is preferable to email as a means of exchanging documents since email is inherently insecure and there is no proof of delivery or time guarantees. The portal acts as a Secure Document Exchange (SDX) that creates a direct, encrypted connection between the external party (you, our client) and the portal.

Before you can access the portal, you will need to set up an Actionstep account. Instructions for doing so are provided below. If we haven't already offered to set up your client portal, please ask any team member to assist you.

1. You will receive an email from the sender "The Estate & Asset Protection Law Firm <support@actionstep.com>" with the subject "The Estate & Asset Protection Law Firm Portal

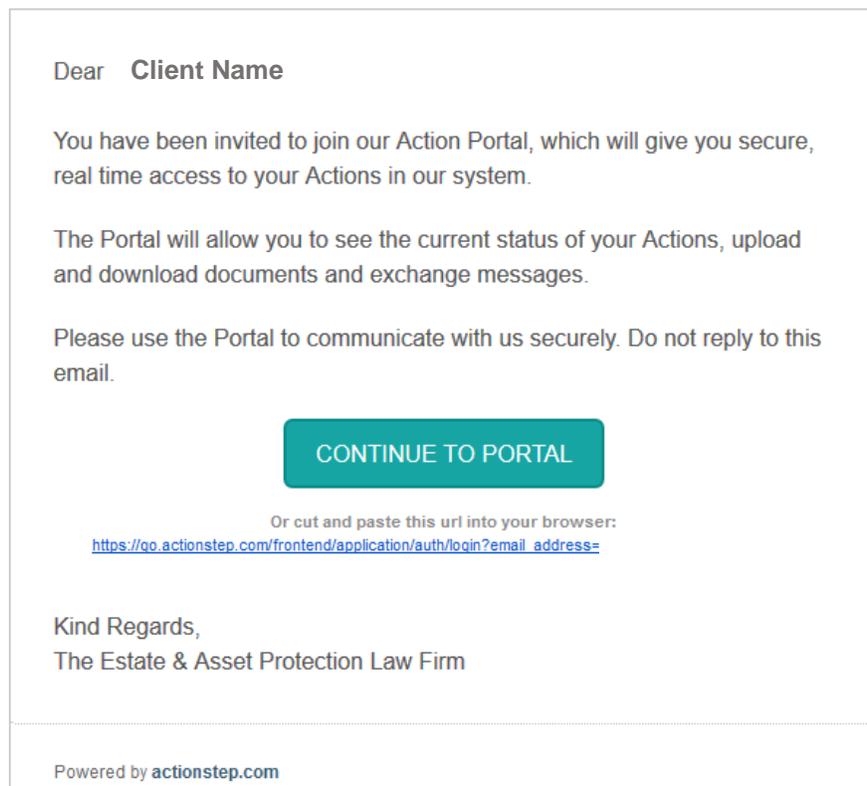
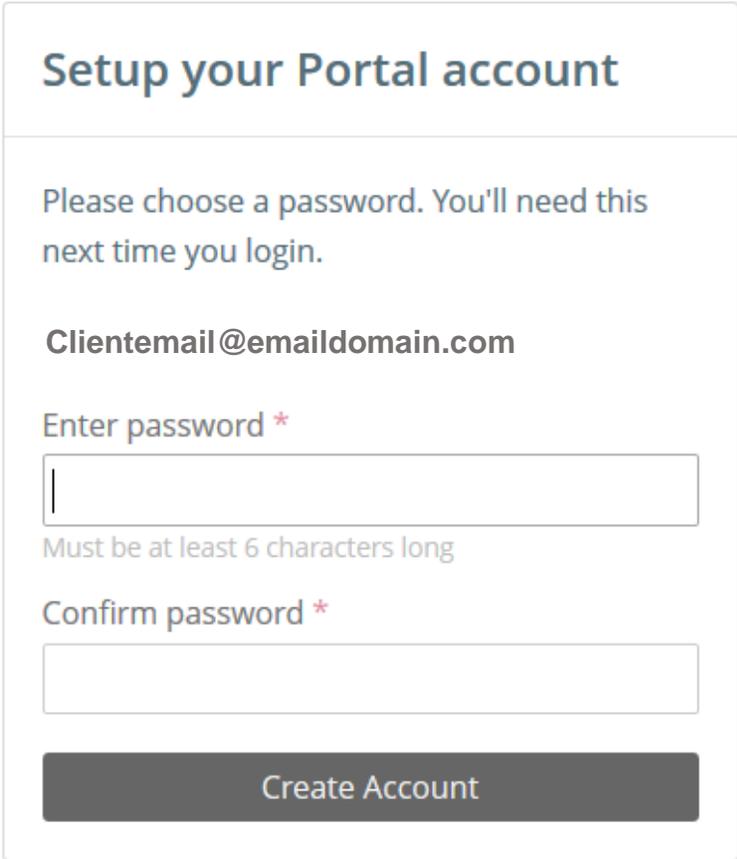


Figure 1

Invitation". You may need to check your spam or junk folder to see if it is misdirected there. If the email you receive does not resemble *Figure 1*, you may need to specify that your email software download pictures, or you may need to view this email on a desktop computer or laptop instead of on your smartphone.

2. In this email either select the button "Continue to Portal" or copy and paste the URL under this button into a web browser.
3. In your web browser, the page in *Figure 2* should load. Select a password of at least 6 characters length and enter it into both fields "Enter password" and "Confirm password" and finally select the button "Create Account". Please write down the password you just created and save it for the next time you login. The firm does not have access to these passwords.

## The Estate & Asset Protection Law Firm



The screenshot shows a web form titled "Setup your Portal account". The form contains the following elements:

- A heading: "Setup your Portal account"
- Instructional text: "Please choose a password. You'll need this next time you login."
- Pre-filled email address: "Clientemail@emaildomain.com"
- Label: "Enter password \*"
- Input field: A text box with a vertical cursor at the beginning.
- Requirement text: "Must be at least 6 characters long"
- Label: "Confirm password \*"
- Input field: A text box.
- Submit button: A dark grey button labeled "Create Account".

Figure 2

4. Once you are logged in, you will have access to a screen similar to the one in *Figure 3*.

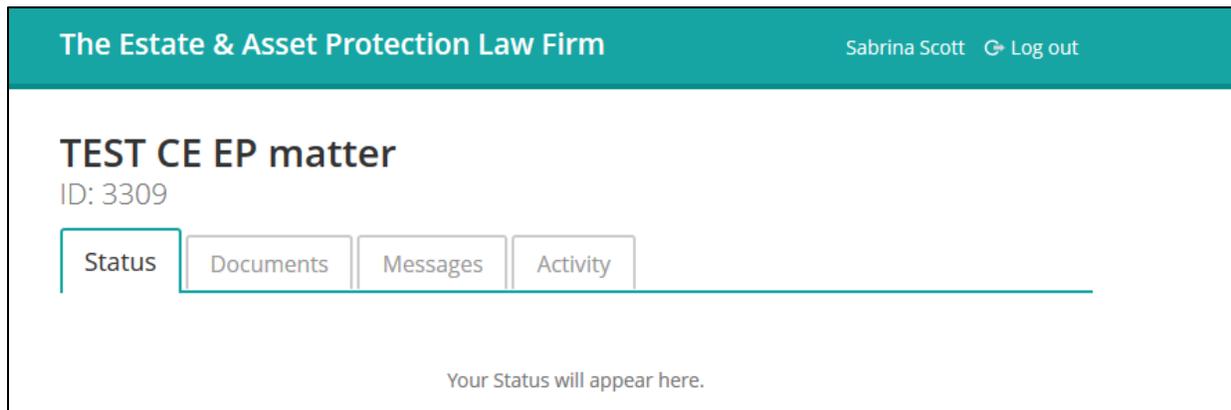


Figure 3

5. Depending on your particular case, you may have access to more than one matter as shown in *Figure 4* where you can select the link "View another Matter".

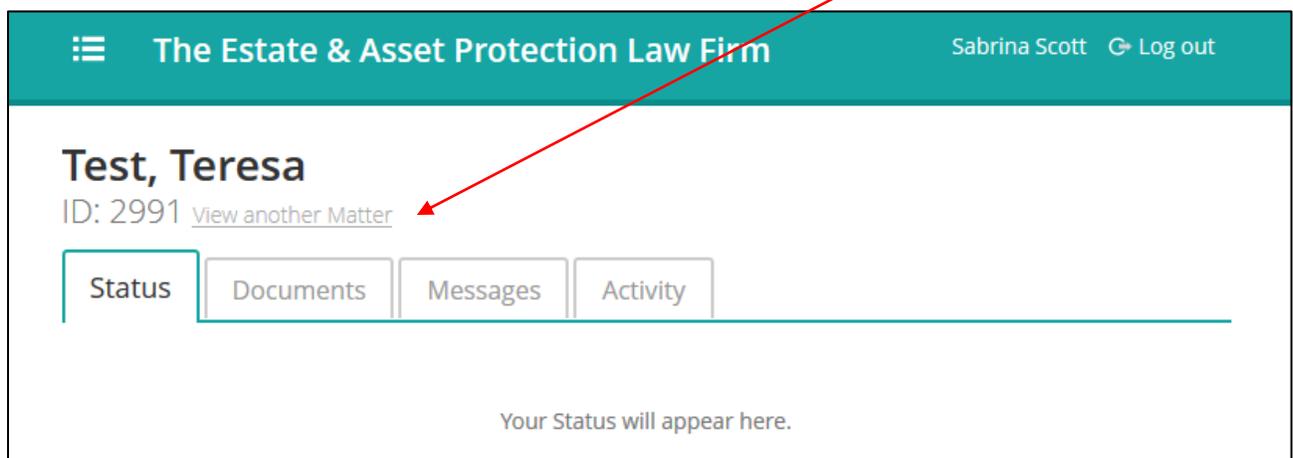
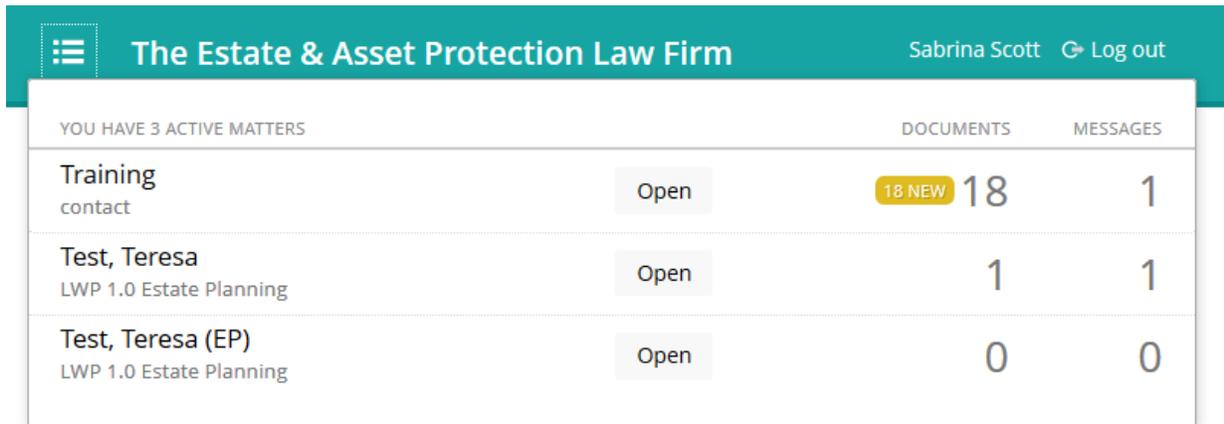


Figure 4

6. Another way to access other matters is using the menu in the upper left corner by selecting the  icon. Once you select this icon, a pop-up window opens listing all your active matters.

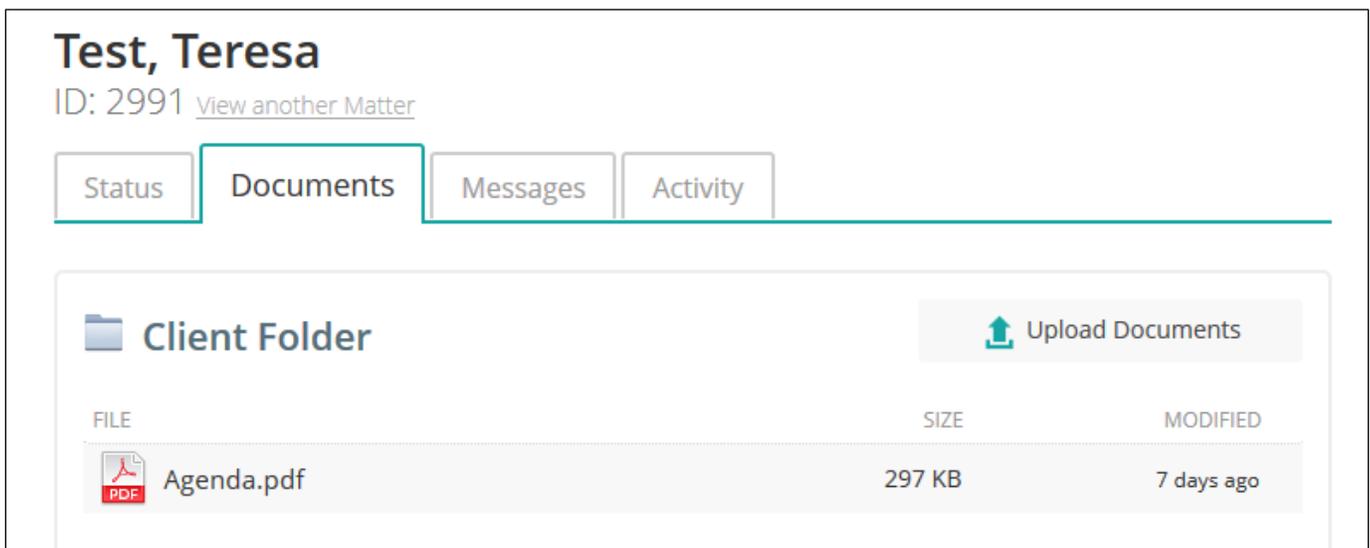


The screenshot shows a dashboard for 'The Estate & Asset Protection Law Firm'. At the top right, it says 'Sabrina Scott' and 'Log out'. Below the header, there's a section titled 'YOU HAVE 3 ACTIVE MATTERS'. To the right of this section are two columns: 'DOCUMENTS' and 'MESSAGES'. The table below lists three matters:

Matter Name	Status	Documents	Messages
Training contact	Open	18 NEW	1
Test, Teresa LWP 1.0 Estate Planning	Open	1	1
Test, Teresa (EP) LWP 1.0 Estate Planning	Open	0	0

Figure 5

7. Under any particular matter, you will have access to four tabs: Status, Documents, Messages, and Activity. The Documents tab is where you can download and upload documents. See *Figure 6*.



The screenshot shows the 'Test, Teresa' matter page. At the top, it says 'ID: 2991' and has a link 'View another Matter'. Below this are four tabs: 'Status', 'Documents', 'Messages', and 'Activity'. The 'Documents' tab is selected. Underneath, there's a 'Client Folder' section with an 'Upload Documents' button. Below that is a table of files:

FILE	SIZE	MODIFIED
 Agenda.pdf	297 KB	7 days ago

Figure 6

8. The Messages tab can be used to send or receive messages through the portal. See *Figure 7*.

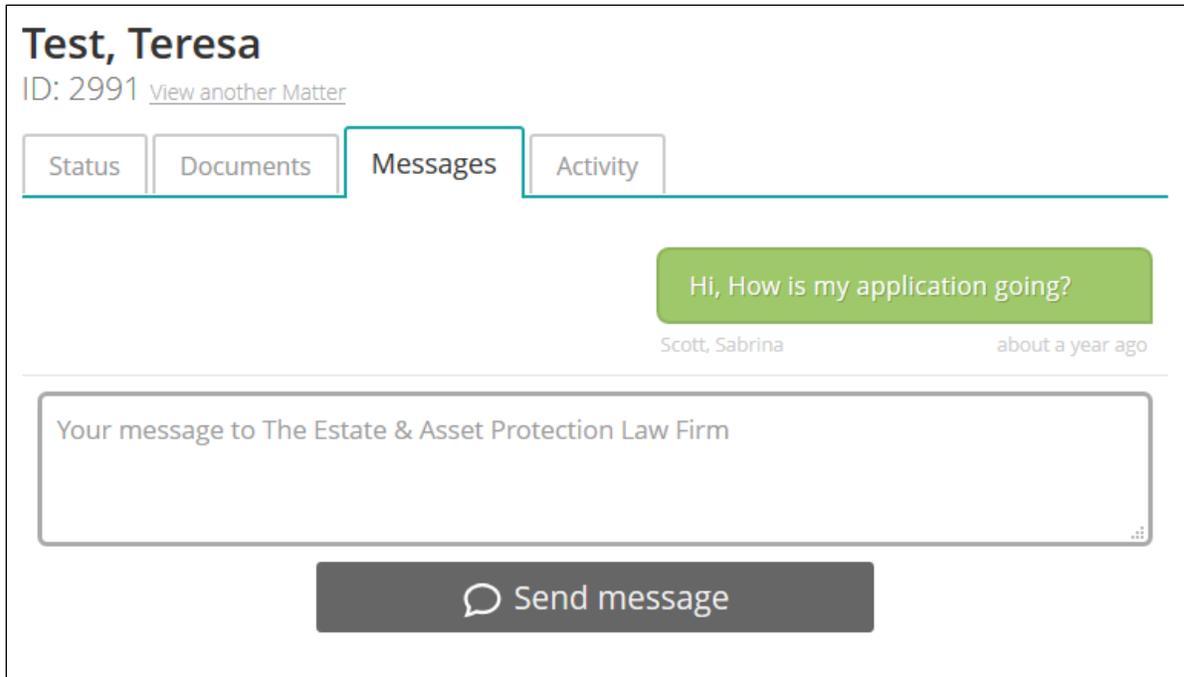


Figure 7

9. The Activity tab automatically records all user activity in the client portal. See *Figure 8*.

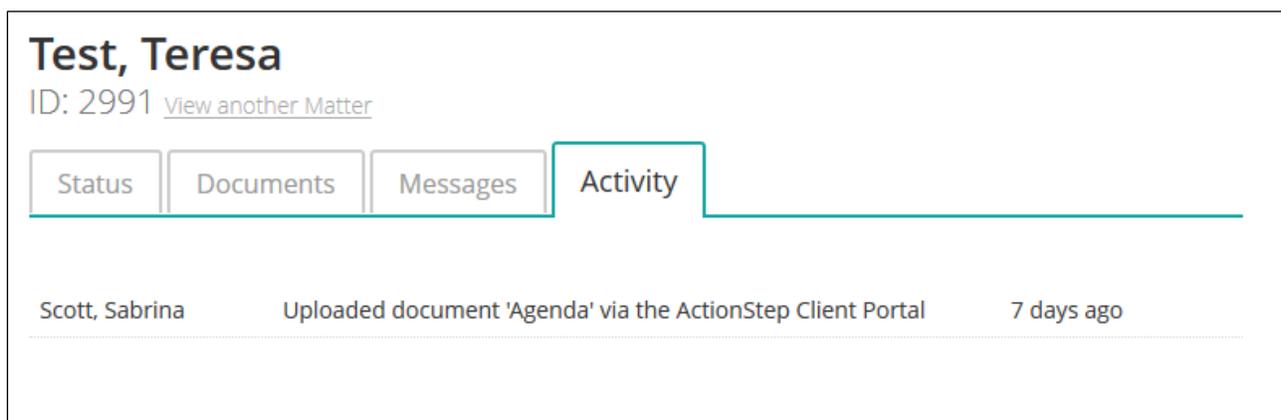


Figure 8

10. If you ever forget your password, you can reset it at the Actionstep login window at <https://go.actionstep.com/> by selecting the "Forgotten password" link under the Password field. See *Figure 9*. You will need to have access to your email in order to receive the password reset email.

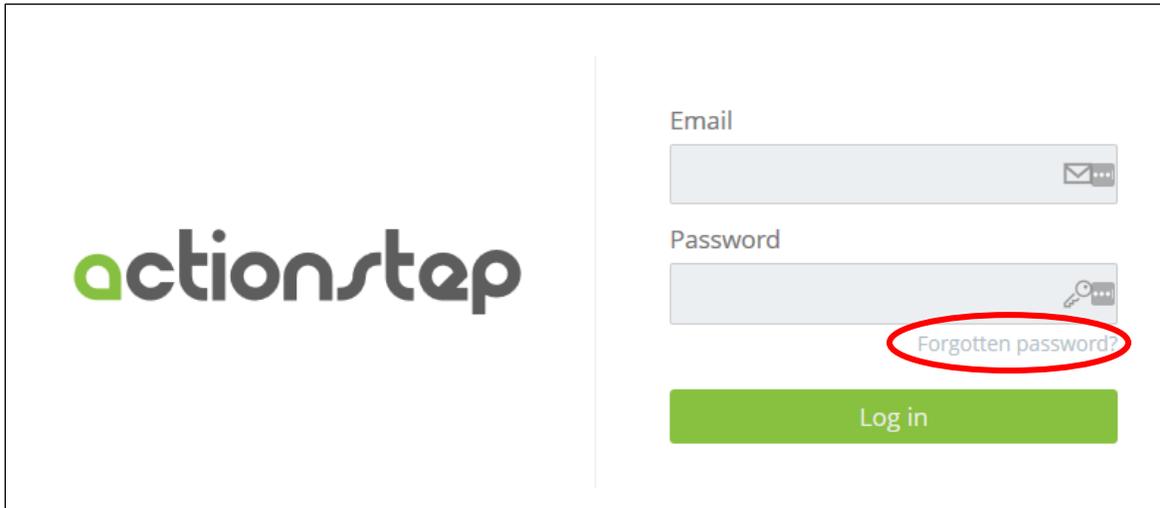


Figure 9