



## Activating and Using the Tamarac Portal: A Guide for Clients

*Tamarac is a top-of-the-line software program that Creekside uses to manage document deliveries securely while allowing clients to login via a secure portal link to view information about their accounts.*

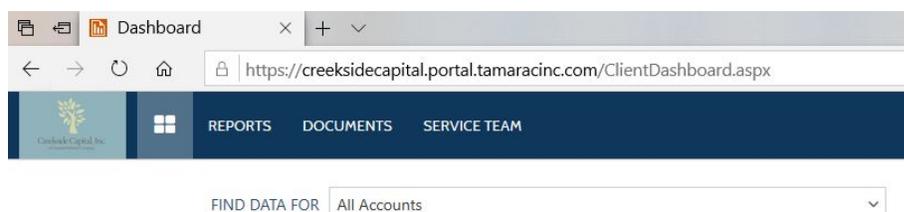
1. Check your email for a link to create an account. The email sender will appear as “Client Portal” and comes from the address: [noreply@investnet.com](mailto:noreply@investnet.com)
2. Create a password.

Passwords must meet the following requirements:

- Passwords must not contain your email address or parts of your full name that exceed two consecutive characters.
  - Passwords must be at least 8 characters and must contain characters from three of the following four character categories:
    - Uppercase letters (A-Z)
    - Lowercase letters (a – z)
    - Numbers (0 – 9)
    - Non-alphanumeric (for example: ! \$ # or % etc.)
3. Agree to the terms of use.
  4. Upon logging in, you see a Dashboard view of your household’s accounts. The top half of the dashboard screen gives a succinct snapshot of your accounts in three tiles: Managed Market Value, Net Contribution, and Performance.

If you have more than one account in your household and wish to see an overview for that specific account, select that account from the drop down menu called “Find Data For”

5. Scroll down on the dashboard screen to see more detailed reports relating to your accounts. Here there are four choices: Asset Allocation, Portfolio Performance, Growth in Dollars, and Current Holdings.
6. Other pages of the portal include: Accounts, Reports, Documents, and Service Team. More details follow describing each area of the portal.





## Reports

To see detailed reports on your accounts, hover your mouse over the Reports tab to select from:

- A. Account Performance
- B. Asset Allocation
- C. Holdings
- D. Capital Flows
- E. Realized Gains/Losses
- F. Transactions

### A. Account Performance

The Account Performance Report shows a graph comparing the performance of your account(s) to various benchmarks.

Currently, you can compare your total portfolio's performance to some major indices. The Russell 3000 is the largest 3000 companies in the United States. The MSCI ACI ex US is a global index that includes companies around the world outside of the US. The Barclay's Aggregate Bond Index includes a diversified set of bonds including, treasuries, corporates, mortgage-backs, and municipal bonds in the United States.

In the near future, we are creating a blended index that will include an allocation to all three of these indices, consistent with the overall allocation of your portfolio so that you can see a reasonable comparison of your portfolio against the market.

### B. Asset Allocation

This donut chart shows how your assets are distributed across various sectors. Sector allocations are a major determinant of your risk and return.

### C. Holdings

See a list of the securities you hold in your account. The holdings report shows a more detailed allocation than the asset allocation donut graph.

### D. Capital Flows

The capital flows graph shows how much you contribute and/or withdraw to your account(s) compared to how much you have made in the market as a function of time.



At this time, this graph will only show your data beginning 1/1/19. It is our hope to provide you historical data for at least part of the time you have been working with our team members prior to the formation of Creekside. We appreciate your patience as we work with our service providers to determine when and how this can be possible.

E. Realized Gains/Losses

Realized Gains and Losses will only appear for taxable accounts. IRAs, Roths, or other retirement accounts fall under a different section of the tax code, and do not need to report realized gains or losses.

F. Transactions

See recent activity in your account such as deposits, withdrawals, buys and sells, dividend payments, bonds maturing, etc.

Documents

This area of the portal provides a secure document vault for any documents you need to send your advisor. Creekside will also use this area to upload your quarterly statements, tax documents, or other sensitive papers.

We are currently working to get your Investment Advisory Agreement/Contract with our firm uploaded to your Portal. If it is not there yet, you should see it within the week.

Service Team

Click on Service Team for an easy way to see your advisor's contact information. Your primary advisor is listed, along with support advisors. Please always feel free to contact any member of Creekside for help answering any questions you have.

Links to Bookmark

You can reach the Tamarac portal directly:

<https://creeksidecapital.portal.tamaracinc.com/>

or via our website:

<https://creeksidecapitalinc.com> and clicking on "Your Accounts", then selecting Creekside Capital Portal

**Questions?**

We hope this handout helped get you access to your Creekside/Tamarac Portal. If not, we are always available for questions and are more than happy to walk you through it.

For your reference, our contact information is below.

Patty Long, Client Services Specialist

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