

# Client Private Page

(Secure Small File Transfer and Messaging)

## User Training Guide

Version 1.1

### Instructions Include:

- Logging on
- Home page navigation
- Access, open, and review files
- Contacting the office via secure messaging service
- Attaching and send files

Helpline - (860) 228-1040

**MKS**



**Investment Management, Inc.**  
Registered Investment Advisor

# “Client Private Page” - access and how to get around

Go to: [www.2281040.com](http://www.2281040.com)

- Click on “[Client Center](#)” ①

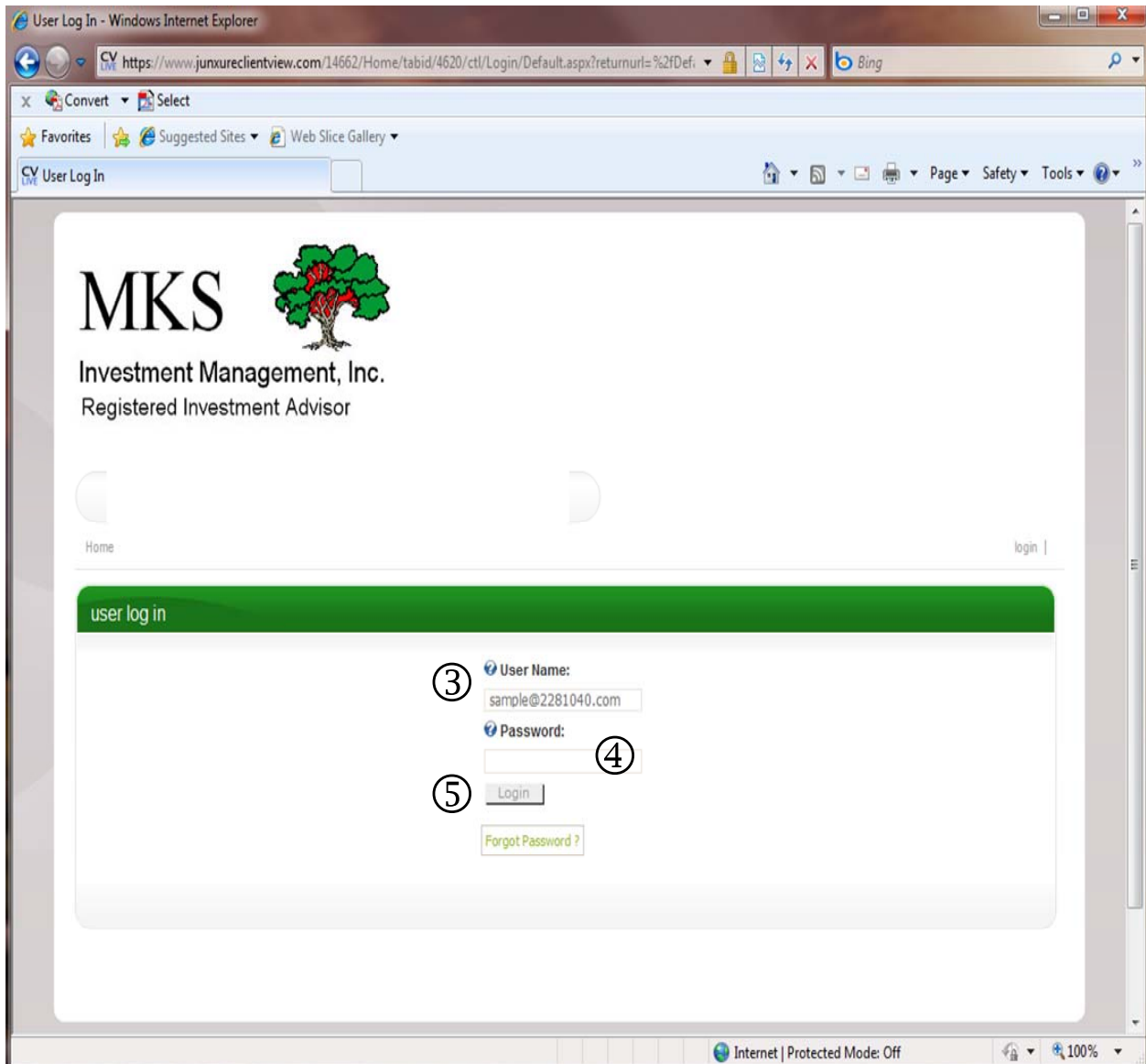
<p><b>D A David &amp; Associates, Inc.</b> <i>Business</i> &amp; <i>Tax Services</i></p> <p><input type="button" value="Enter"/></p>	<p><b>MKS Investment Management, Inc.</b> <i>Fee-Only Financial Planning Services</i> For Individuals and Small Businesses</p> <p><small>The information on this website is intended for use only by residents of Connecticut. Securities related services may not be provided to individuals that do not reside in Connecticut.</small></p>
<p>① <b><a href="#">Client Center</a></b> <i>Private Access Online for your tax &amp; financial documents</i> <i>File Transfer &amp; Secure Messaging</i></p>	<p><i>PO Box 1554</i> <i>Hebron, CT 06248</i> <i>860-228-1040</i></p>

- Click on “[Client Private Page](#)” ②

<p><b>MKS Investment Management, Inc.</b> <b>D A David &amp; Associates, Inc.</b> <b>Client Center</b></p> <p><a href="#">Home</a></p>		
<p>② <b><a href="#">Client Private Page</a></b></p>	<p><b>Your Personal Page</b></p> <ul style="list-style-type: none"><li>• Send &amp; receive secure notes and small files.</li><li>• Keep track of Active tasks</li><li>• Access Your Financial Reports &amp; Tax Records.</li></ul>	<p><i>Designed for all Clients.</i></p>
<p><b><a href="#">MKS TD Ameritrade VEO Login</a></b></p>	<ul style="list-style-type: none"><li>• Access your TD Ameritrade accounts</li><li>• Review TD Ameritrade Statments</li></ul>	<p><i>For Clients with investments at TD Ameritrade</i></p>
<p><b><a href="#">MKS Portfolio Reports</a></b></p>	<ul style="list-style-type: none"><li>• Online Access to Selected Portfolio Reports</li></ul>	<p><i>For our Investment</i></p>

## *“Client Private Page” - access and how to get around*

- Enter “User Name” - typically this will be your e-mail address ③
- Enter “Password” ④
- Click “Login” ⑤



# “Client Private Page” - home page

- “**home**” - return to this page ①
- “**document vault**” - Access to file repository ②
- “**contact us**” - Access to e-mail and document file submission to our office. ③
- “**news**” - news feeds for possible future use ④
- “**announcements**” - Message board containing messages from our office ⑤
- “**my alerts**” - Any correspondence items that are sent will be listed here until they are read and/or completed. Notices specifically directed to you will also show up in this area. ⑥

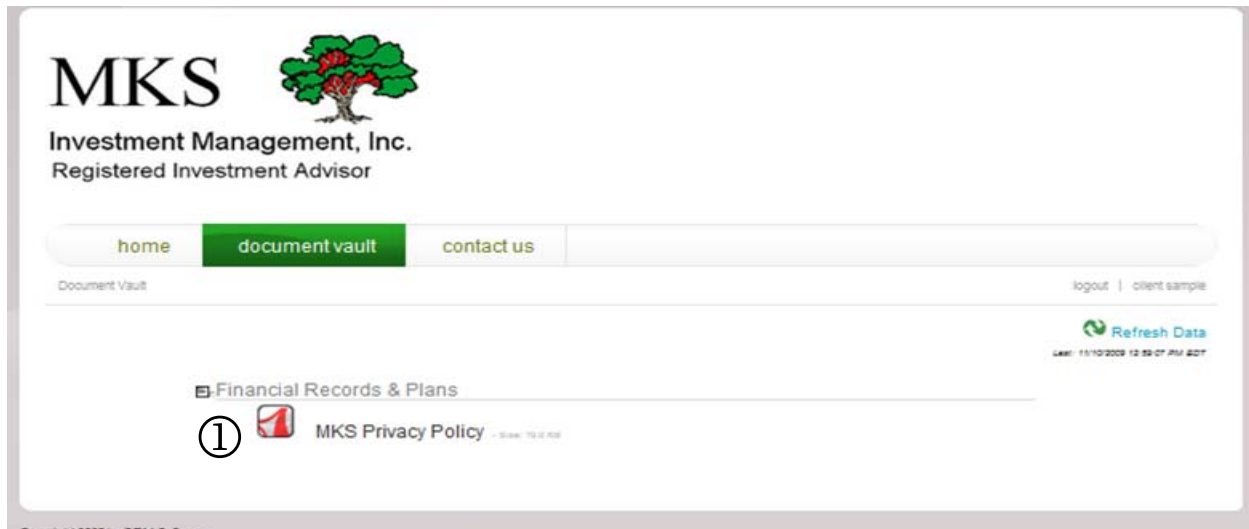
*NOTE: all information shown is sent through a secure network*

The screenshot shows the MKS Client Private Page home page. At the top left is the MKS logo and the text "Investment Management, Inc. Registered Investment Advisor". Below this is a navigation menu with three items: "home" (circled 1), "document vault" (circled 2), and "contact us" (circled 3). To the right of the navigation menu are links for "logout" and "client sample". Below the navigation menu is a "Refresh Data" button with a timestamp "LAW: 11/10/2009 12:55:07 PM EDT". The main content area is titled "Client & Spouse Sample". It features three sections: "news" (circled 4), "announcements" (circled 5), and "my alerts" (circled 6). The "announcements" section contains a welcome message: "Welcome to the new MKS Client Private Page System !!", a link to "Our Website: 2281040.com", and "Other MKS Links available on our Client Center: 2281040.com/ClientCenter1040.htm". The "my alerts" section contains a sample note: "This is a sample note. Any contact items you send to us will be listed here until they are read and/or completed. We may also send you a notice that will show up here as well. All information shown here is sent through a secure network connection." and "Assigned To: <Client> - Due on 06/30/2010".

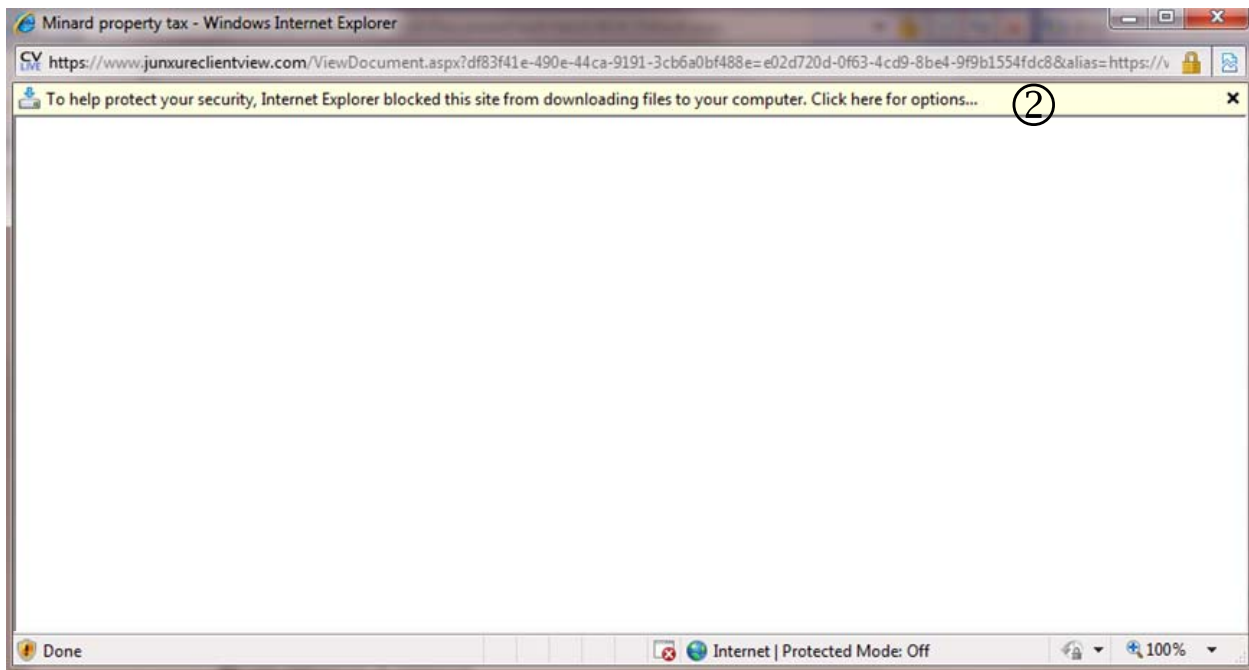
## “document vault” tab

### To open a file

- Click on desired file(s) within listing ①

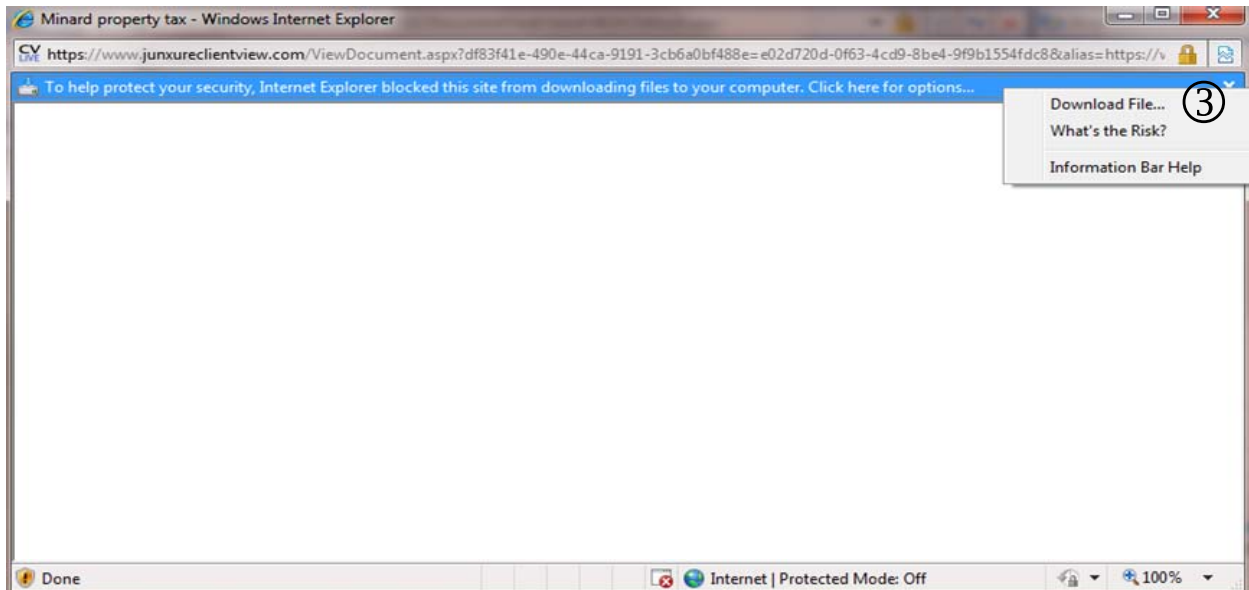


- Click on Internet Explore security area (shaded area with yellow background that will turn blue as cursor rolls over area), which will bring up “options box” ②

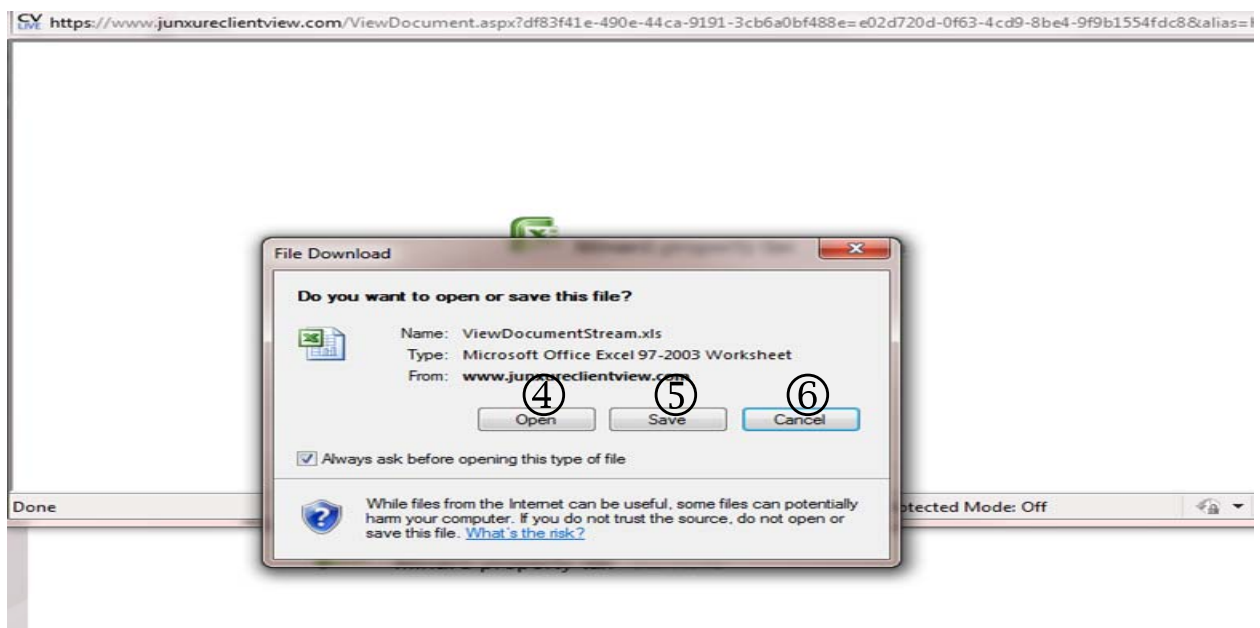


## “document vault” tab - continued

- Click on “download file” ③



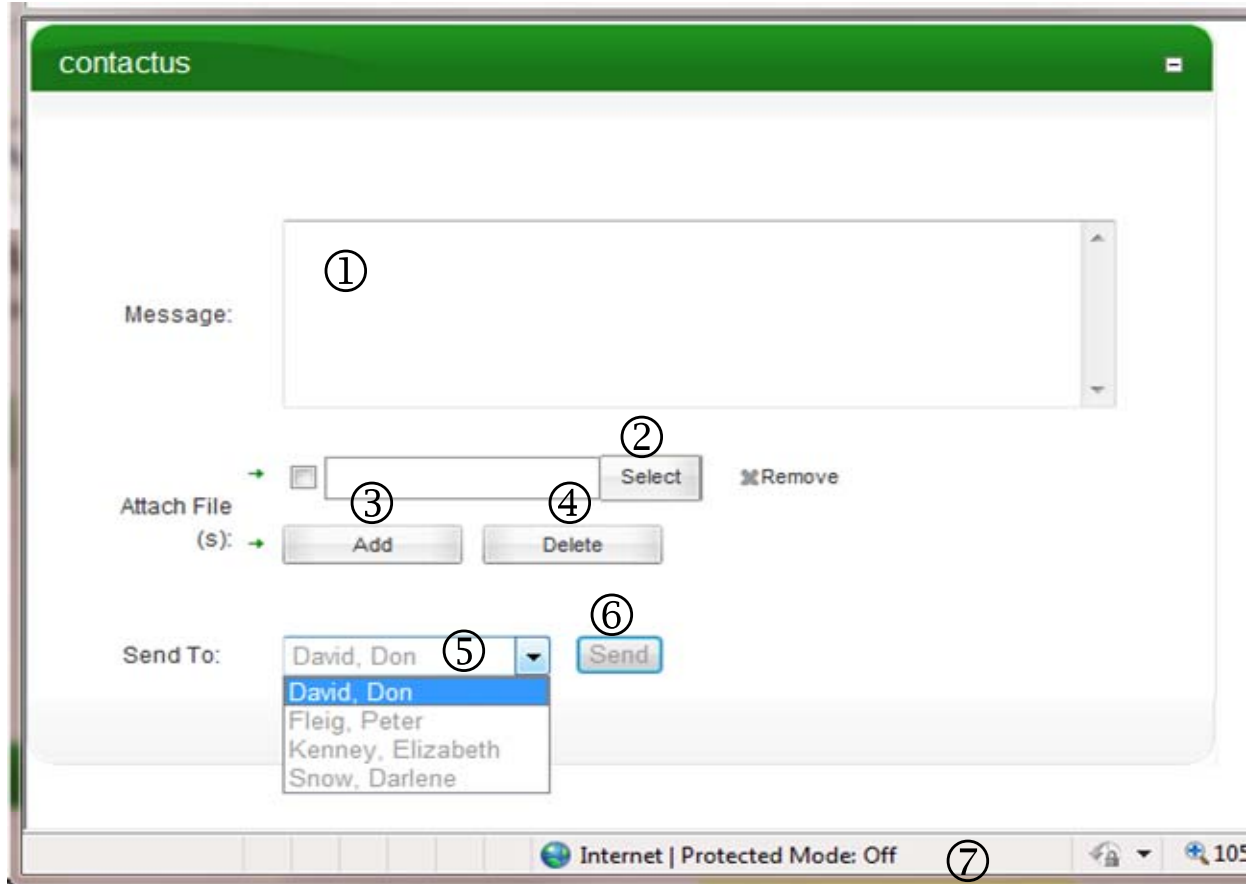
- Select “Open” to view file ④
- Select “Save” to copy file to your hard drive. ⑤
- Select “Cancel” to abort download ⑥



## “contact us” tab

### To send a message and attach a file

- Type message in message box ①
- Click on “select” button to browse your computer for file(s) to be attached ② for submittal to our office.
- Once file is located, click “add” to attached file ③ or “delete” to remove file (note this will not delete file from your computer.) ④
- Select to who’s attention message is to be directed to from drop down box. ⑤
- Click “send” once finished ⑥



**NOTE:** To view and access “to the attention of” and “send” button, you may have to grab and expand bottom of window.

To expand window—run cursor at bottom of window until up and down arrow appears, click and hold down mouse button, then drag and pull window down to expose missing fields ⑦