

VAULT – HOW TO LOG IN AND NAVIGATE

NOTE: If you want to change your password see the “How to change your password” steps at the end of this document.

1. Click on this link: <https://apiav.com/sites/planahead/default.aspx> or type <https://apiav.com/sites/planahead/default.aspx> into your Internet browser.

The diagram shows a login form with three yellow boxes on the left containing instructions: "Enter your username", "Enter your password", and "Click login". Arrows point from these boxes to the corresponding fields in the login form on the right. The form has a title "Login", a "Username" input field, a "Password" input field, a red "Login" button, and two links: "I forgot my password" and "Having trouble logging in? (Internet Explorer 8 users)".

4. You should now be logged in to the vault, looking at your Unread Files.

The screenshot shows a Windows Internet Explorer browser window displaying the Plan Ahead Inc. website. The address bar shows https://apiav.com/sites/planahead/_layouts/common/unreadfiles.aspx. The page title is "Plan Ahead Inc. - Unread Files". The main content area features a red header with the text "Unread Files" and a message below it: "There are no unread files". On the left side, there is a navigation menu with the following items: "Edit Profile", "Manage Professionals", "Portfolio Reports", "My Documents", "Shared Documents", "UnRead Files" (highlighted in red), "Help", and "Log Out". The top right of the page says "Welcome EnsorS | Log Out Help". The bottom left corner of the page shows "Ser2".

TO VIEW OLD REPORTS OR DOCUMENTS:

Plan Ahead Inc. - Vault - Windows Internet Explorer

https://apiav.com/sites/planahead/DocumentLibrary/F... Identified by Go Daddy Class 2 Certific... Google

File Edit View Favorites Tools Help

Plan Ahead Inc. - Vault

Welcome **Ensors** | [Log Out](#) [Help](#)

PLAN AHEAD, INC.
CHARTING YOUR FINANCIAL FUTURE

My Documents

Home > Vault Folder > Paul Schnitman > Ensors

Keyword -- Select -- **SEARCH**

Type	Name	Modified	Modified By	Description	File Size	DeleteDate	FolderSize
Folder	Investments	8/12/2010 2:53 PM	pschnitman				0 Bytes

Click on "My Documents"

Plan Ahead Inc. - Vault - Windows Internet Explorer

https://apiav.com/sites/planahead/DocumentLibrary/Forms/AllItems... Advisor Products Inc [US] Google

File Edit View Favorites Tools Help

Plan Ahead Inc. - Vault

Welcome **Ensors** | [Log Out](#) [Help](#)

PLAN AHEAD, INC.
CHARTING YOUR FINANCIAL FUTURE

My Documents

Home > Vault Folder > Paul Schnitman > Ensors

Keyword -- Select -- **SEARCH**

Type	Name	Modified	Modified By	Description	File Size	DeleteDate	FolderSize
Folder	Investments	8/12/2010 2:53 PM	pschnitman				0 Bytes

Click on the folder icon next to "Investments"

Plan Ahead Inc. - Vault - Windows Internet Explorer

https://apiav.com/sites/planahead/DocumentLibrary/Forms/AllItems.aspx

Advisor Products Inc [US] | Google

File Edit View Favorites Tools Help

Plan Ahead Inc. - Vault

Client Welcome **Ensors** | Log Out Help

Edit Profile

Manage Professionals Home > Vault Folder > Paul Schnitman > Ensors > Investments

Portfolio Reports Keyword -- Select -- * **SEARCH**

My Documents New Upload View: All Documents

Type	Name	Modified	Modified By	Description	File Size	DeleteDate	FolderSize
	Portfolio	8/12/2010 2:53 PM	pschnitman				0 Bytes

Click on the folder icon next to "Portfolio"

Ser2

Internet 100%

Plan Ahead Inc. - Vault - Windows Internet Explorer

https://apiav.com/sites/planahead/DocumentLibrary/Forms/AllItems.aspx

Advisor Products Inc [US] | Google

File Edit View Favorites Tools Help

Plan Ahead Inc. - Vault

This website wants to run the following add-on: 'Name ActiveX Control' from 'Microsoft Corporation'. If you trust the website and the add-on and want to allow it to run, click here...

Edit Profile

Manage Professionals Home > Vault Folder > Paul Schnitman > Ensors > Investments > Portfolio

Portfolio Reports Keyword -- Select -- * **SEARCH**

My Documents New Upload View: All Documents

Type	Name	Modified	Modified By	Description	File Size	DeleteDate	FolderSize
	Invoices	8/12/2010 2:53 PM	pschnitman				0 Bytes
	Reports	8/12/2010 2:53 PM	pschnitman				0 Bytes
	Tax_Information	8/12/2010 2:53 PM	pschnitman				0 Bytes
	TD_Ameritrade_Statements	10/18/2010 4:33 PM	pschnitman				

To go back to a different folder, click on the word "Portfolio", then click the other folder you want.

Click on the folder icon next to the document you want to view. You will then see a list of documents we have uploaded. Click on the icon next to the report or document you want to view. This will open the file.

Ser2

Internet 100%

HOW TO CHANGE YOUR PASSWORD

Plan Ahead Inc. - Edit Profile - Windows Internet Explorer

https://apiav.com/sites/planah... Advisor Product... Google

File Edit View Favorites Tools Help

Convert Select

Favorites Folder Recursion in AutoIt Tutorial Core Language - Au... Advisor Vault - Login TD AMERITRADE Institutional

Plan Ahead Inc. - Edit Profile

Client Welcome **EnsorS** | [Log Out](#) [Help](#)

PLAN AHEAD, INC.
CHARTING YOUR FUTURE

Edit Profile **Edit Profile** [Change Password](#)

Edit Profile

Manage Professionals

Portfolio Reports

My Documents

Shared Documents

Unread Files

Help

Log Out

* Required Fields

Username	EnsorS
Client First Name	<input type="text" value="Steven"/>
* Client Last Name	<input type="text" value="Ensor"/>
Phone	<input type="text"/>
* E-mail	<input type="text" value="stevenensor@planaheadin"/>
* Storage Maximum Value	<input type="text" value="3000"/> MB
* Storage Threshold Value	<input type="text" value="2900"/> MB
* Security Question	<input type="text" value="What is your father's middle name?"/>
* Security Answer	<input type="text" value="Steven"/>

UPDATE **CANCEL**

Ser1

Internet 100%

Advisor Vault - ChangePassword - Windows Internet Explorer

https://apiav.com/sites/planah... Identified by Go... Google

File Edit View Favorites Tools Help X Convert Select

Favorites Folder Recursion in AutoIt Tutorial Core Language - Au... Advisor Vault - Login TD AMERITRADE Institutional

Advisor Vault - ChangePassword Page Safety Tools

pa **PLAN AHEAD, INC.**
CHARTING YOUR FINANCIAL FUTURE

Change Your Password

Password

New Password

Your password must be at least 8 characters in length and contain at least one uppercase, one lowercase, one number and one special character (!@#\$%^&*()_+={}|:;<>?/\|.,).

Confirm New Password

Change Password

1. Type the old password.

2. Type what you want to change the password to (notice the password requirements in red).

3. Click "Change Password"

McAfee SECURE™
TESTED DAILY 22-MAR

Done Internet 100%