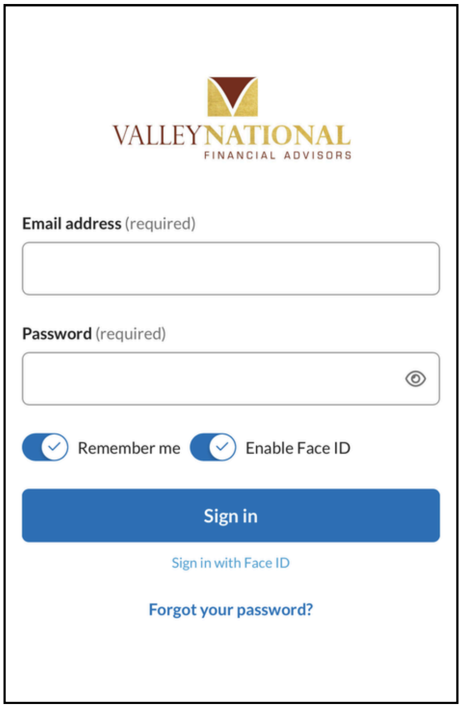
VALLEYNATIONAL
FINANCIAL ADVISORS

eVault Mobile App User Guide

Accessing eVault Client Portal

You can download the Valley National Client Access App to your device from either the Apple App Store or the Google Play Store. For assistance, please refer to the download instructions on our website.



Opening the app will bring you to this login screen. To access your account, enter your client portal credentials and select **Sign In**.

If you forgot your password, please select the **Recover it here** link at the bottom.

Toggle on the **Remember Me** feature to save your username for future login attempts.

Toggle on the **Enable Face ID** feature for a quicker login experience.

.....Continue to the next page.....

Home Page

The mobile app home page is a scrollable version of your client portal dashboard. Please scroll down to see all five of your widgets.

To filter your entire dashboard on a specific account or portfolio, select the Funnel Icon at the top right of the screen. Then, under Show data for, choose the desired account/portfolio and select Apply.

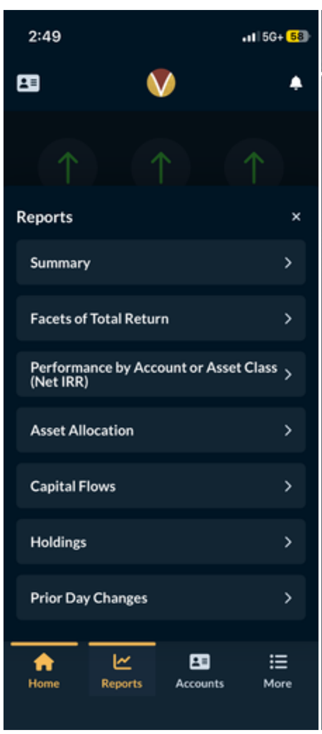
To filter on a specific widget, select the Pencil Icon at the top right of the widget. Widgets can be filtered by account/portfolio and by date period. Select the desired options and select Done.

To dive deeper into the data behind a widget, select the See more button at the bottom right of the widget. This will direct you to its corresponding detailed report.

To return to the home page, click on the Home Icon at the bottom left of the screen.

Reports Page

The mobile app reports page is a condensed version of your client portal reports. Please select your desired report from the list provided.



Reports can be filtered by selecting the **Funnel Icon** at the top right of the screen. Filter options vary depending on the type of report. For example, the **Summary** report can only be filtered by account/portfolio, while the **Performance** report can be filtered by account/portfolio, **Date Period**, and **Group** type.

Some reports have additional features. For example, the **Holdings** report allows you to select a security and view each **Lot** in detail. The **Asset Allocation** report's donut chart can be changed into a bar chart by clicking the chart icon at the top right. You can select different parts of this chart for a dollar/percentage breakdown.

Docs Page

The mobile app documents page lets you view and upload documents to your client portal.

Select the **Recent** drop-down in the top left to view the **Folders** or **Other Files** view. The recent files view will show you the 15 most recent documents.

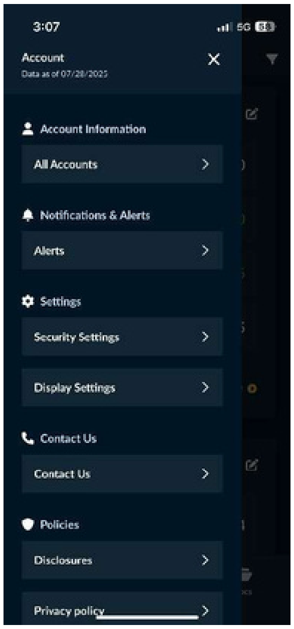
To download and view a document, select the desired document and click **Open File**.

To upload a document, select the gold **Cloud Icon** at the top right corner and select the document you wish to upload.

To delete a document you uploaded, select the **Three Dots** next to the desired document, then click **Delete**.

Account Sidebar

Access the account sidebar by selecting the **ID Card Icon** at the top left of the screen.



To view account balances, select **All Accounts**, then choose the desired custodian and account.

Select **Alerts** to view any updates or messages from Valley National.

In **Security Settings**, you can enable **Biometric Login**. This allows you to log in with Face ID or fingerprint scans.

Open **Display Settings** to change your color mode to **Light** or **Dark**.

Select **Contact Us** to view your service team members and their contact information.