

Logging Into JPass and Viewing Compensation Statements

LAUNCHING: Launch the site by going to: <https://www.jcore.jacocomo.com/jacocomo/Jacocomo.html>

LOGGING IN: You will see the JPass login box. Enter your information as follows:



- **LOGIN:** Type your first initial and last name. The first two letters are capitalized.

- **PASSWORD:** This is generated by the home office.

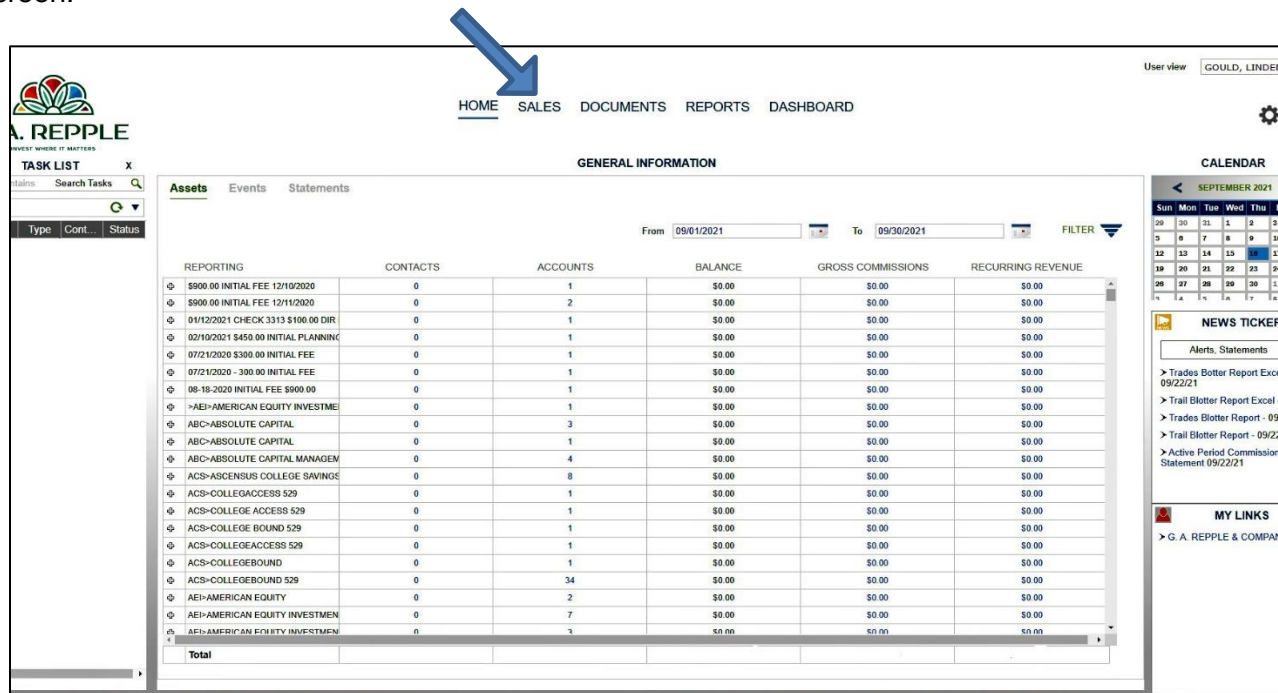
**You can change your password whenever you wish. Click the green CHANGE PASSWORD button at the bottom of the Login box to do this.*

- **COMPANY:** This will always be GAR. It will be capitalized regardless of how you type it. Click the green LOGIN button to proceed.

ENTERING THE SITE:

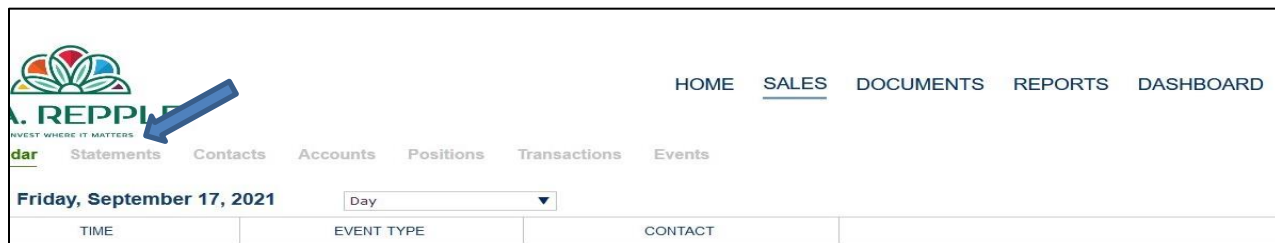
After you log in, you will be on the HOME screen.

To view Commission Statements, click on the SALES button just to the right of the HOME button at the top of the screen.

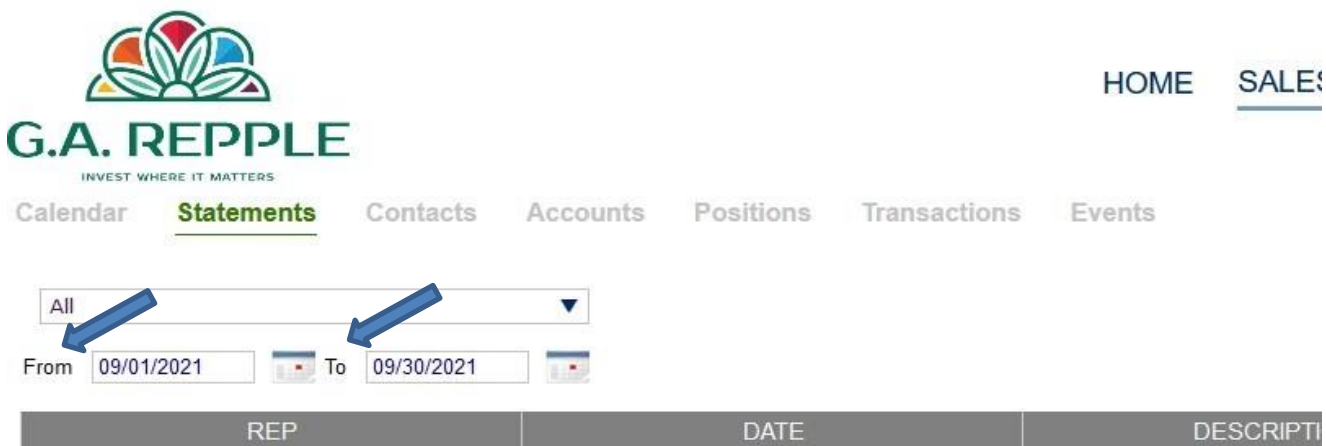


REPORTING	CONTACTS	ACCOUNTS	BALANCE	GROSS COMMISSIONS	RECURRING REVENUE
◇ \$900.00 INITIAL FEE 12/10/2020	0	1	\$0.00	\$0.00	\$0.00
◇ \$900.00 INITIAL FEE 12/11/2020	0	2	\$0.00	\$0.00	\$0.00
◇ 01/12/2021 CHECK 3313 \$100.00 DIR	0	1	\$0.00	\$0.00	\$0.00
◇ 02/10/2021 \$450.00 INITIAL PLANNING	0	1	\$0.00	\$0.00	\$0.00
◇ 07/21/2020 \$300.00 INITIAL FEE	0	1	\$0.00	\$0.00	\$0.00
◇ 07/21/2020 - 390.00 INITIAL FEE	0	1	\$0.00	\$0.00	\$0.00
◇ 08-18-2020 INITIAL FEE \$900.00	0	1	\$0.00	\$0.00	\$0.00
◇ -AEI-AMERICAN EQUITY INVESTME	0	1	\$0.00	\$0.00	\$0.00
◇ ABC-ABSOLUTE CAPITAL	0	3	\$0.00	\$0.00	\$0.00
◇ ABC-ABSOLUTE CAPITAL	0	1	\$0.00	\$0.00	\$0.00
◇ ABC-ABSOLUTE CAPITAL MANAGEM	0	4	\$0.00	\$0.00	\$0.00
◇ ACS-ASCENSUS COLLEGE SAVINGS	0	8	\$0.00	\$0.00	\$0.00
◇ ACS-COLLEGEACCESS 529	0	1	\$0.00	\$0.00	\$0.00
◇ ACS-COLLEGE ACCESS 529	0	1	\$0.00	\$0.00	\$0.00
◇ ACS-COLLEGE BOUND 529	0	1	\$0.00	\$0.00	\$0.00
◇ ACS-COLLEGEACCESS 529	0	1	\$0.00	\$0.00	\$0.00
◇ ACS-COLLEGEBOUND	0	1	\$0.00	\$0.00	\$0.00
◇ ACS-COLLEGEBOUND 529	0	34	\$0.00	\$0.00	\$0.00
◇ AEI-AMERICAN EQUITY	0	2	\$0.00	\$0.00	\$0.00
◇ AEI-AMERICAN EQUITY INVESTMEN	0	7	\$0.00	\$0.00	\$0.00
◇ AEI-AMERICAN EQUITY INVESTMEN	0	1	\$0.00	\$0.00	\$0.00
Total					

Once on the Sales page, you will see a row of buttons across the next screen. Look for the button that is labeled STATEMENTS and click on it.



You can limit the statement period you wish to look for by entering the From and To dates in the search boxes.



Then, look for **FILTER**  at the far right of the screen.

Once you have clicked FILTER, you will see the reports available for the selected period.

There are three main reports available to you:

1. JCore Commissions Statement Report: Summary of compensation, expenses, adjustments, and override information for a given pay period
2. Trades Blotter Report: Details of individual or one-time transactions (PDF and Excel).
3. Trails Blotter Report: Detail report of recurring revenue (PDF and Excel) - i.e. 12b1s, mutual fund trails, variable annuity trails, fees
4. **Double click on the reports to open them.** You are able to save or print these reports.

EXITING THE SITE: Find the person icon at the top right of the screen.

Left click on that icon and click on Sign Out.

