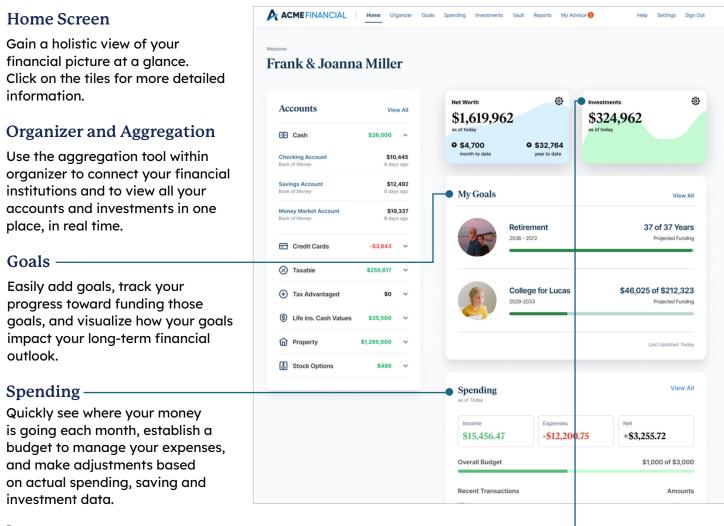


YOUR CLIENT PORTAL

A Guide to Your Client Portal

Engage with your finances, save time, and communicate with your advisor.



Investments

Monitor your investment performance and asset allocation.

Vault

Upload important documents for safe keeping in the vault, which is protected by the highest level of security in the industry. There are private folders, which are just for you, and shared folders, where you can easily share documents with your advisor.