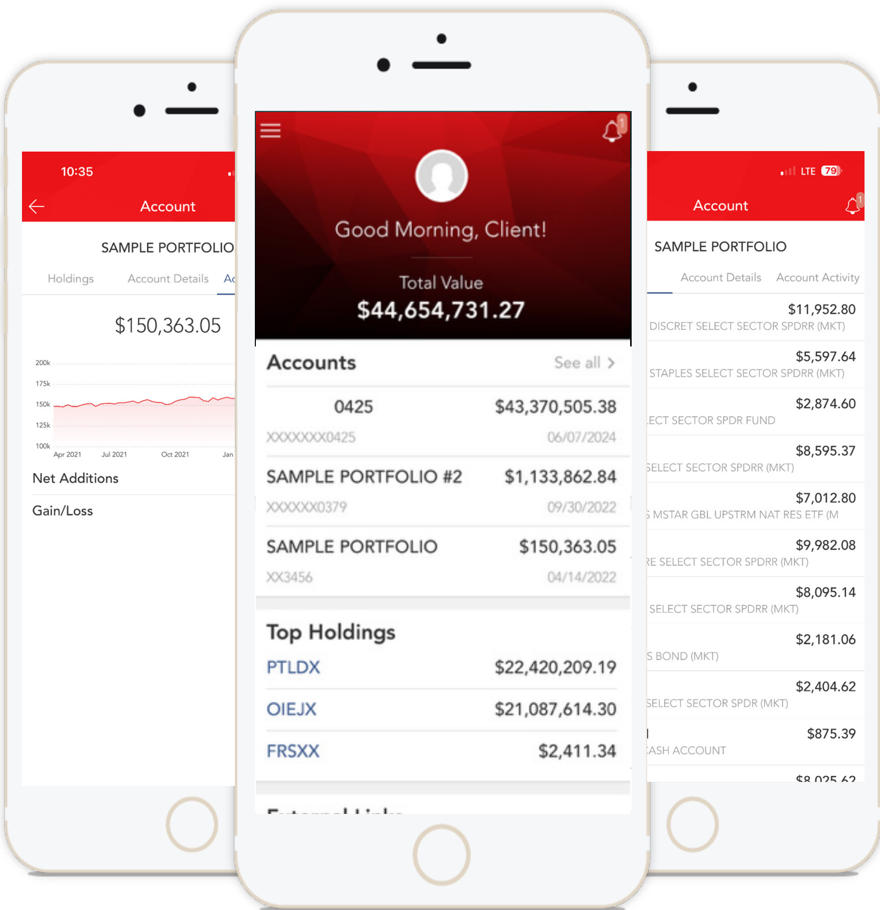
Wealth Management

Quick Reference Guide:
Personal Financial Portal Client Guide

Welcome to your personal financial portal

Personalized for you

From your portal, you have access to unique information and insights, account details, your investment dashboard, a document vault, instant access from any of your devices, and more.



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Stay connected to your financial picture

Home Page
At-a-glance view of pertinent account information

Net Worth
A detailed list of your accounts and balance sheet report with aggregation capabilities

Portfolio
Dynamic view of your entire portfolio

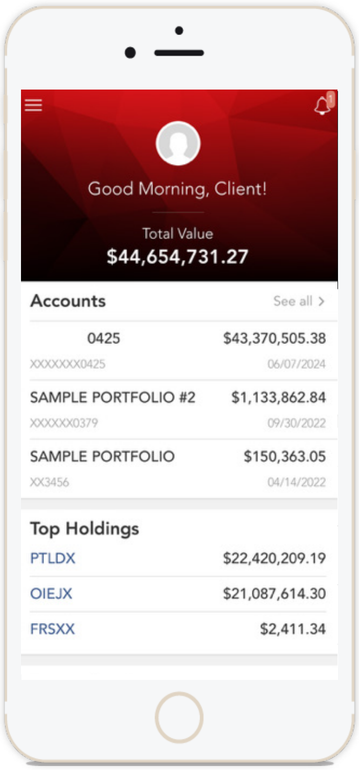
Vault
Easily keep track of and share your important financial and legal documents

Home Page

When you log in, you'll see your personalized home page. Then, across the top, you have quick access to the other pages of your portal.

Your accounts and total portfolio value are listed front and center. Next to your accounts, you'll also find your top holdings for quick reference.

You can stay connected to your financial team with clickable links to phone numbers, emails, and office locations.



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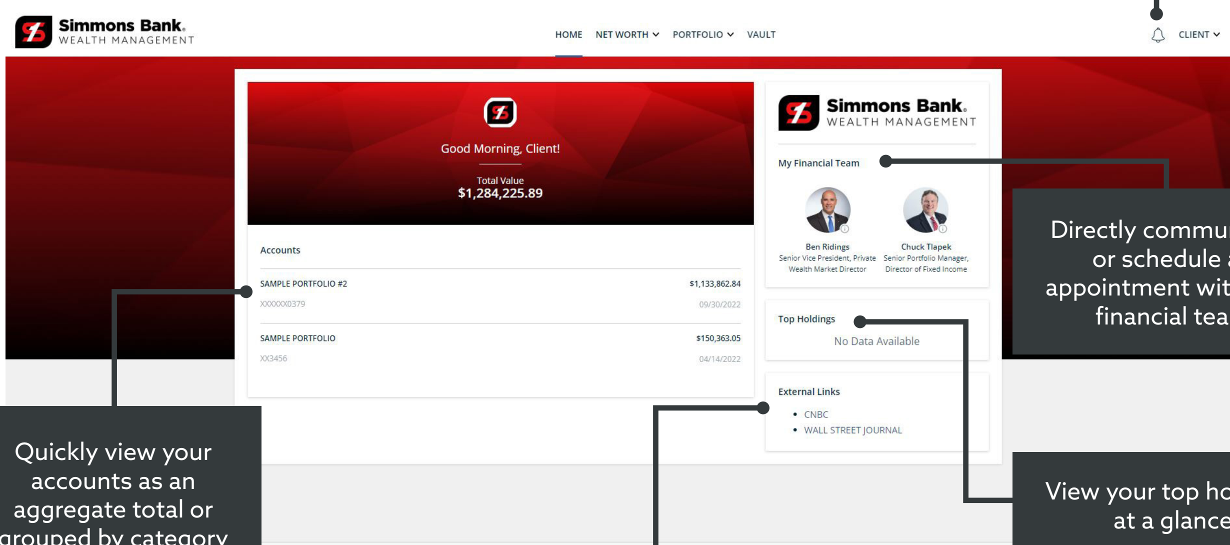
Home Page (Continued)

View notifications from your advisor



Directly communicate or schedule an appointment with your financial team

Quickly view your accounts as an aggregate total or grouped by category

View your top holdings at a glance

Use the quick links we have provided to view our latest blog posts, events etc.

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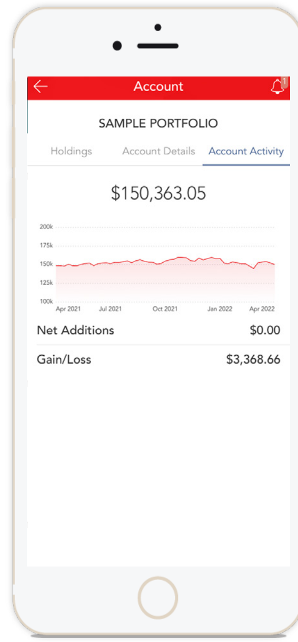
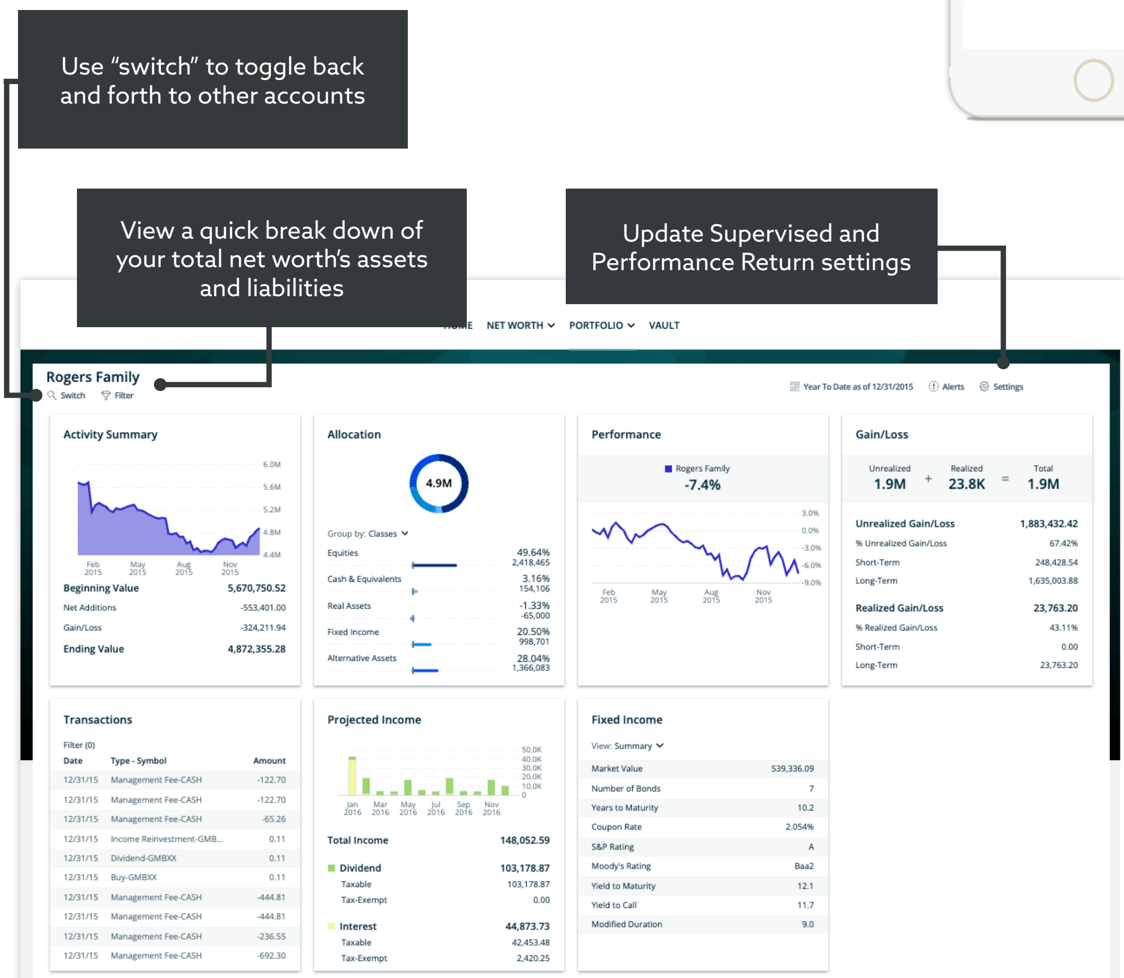
Portfolio



The Portfolio dashboard is where you can view additional details about your portfolio. The dashboard gives you a dynamic overview of your portfolio with performance cards highlighting key information about your portfolio.

To get even more detail, you can click on the title of each card. You can also use the drop-down menu to quickly switch between the different cards.

All this information is completely customizable using the filters to select specific date ranges, portfolios, or accounts.



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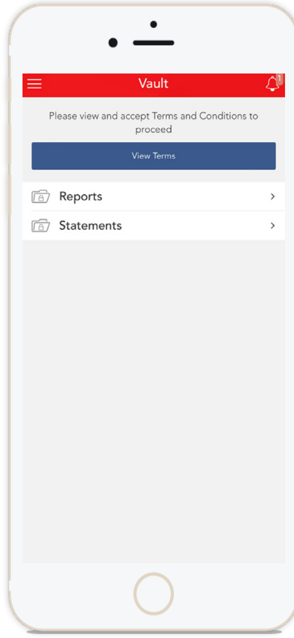
Vault

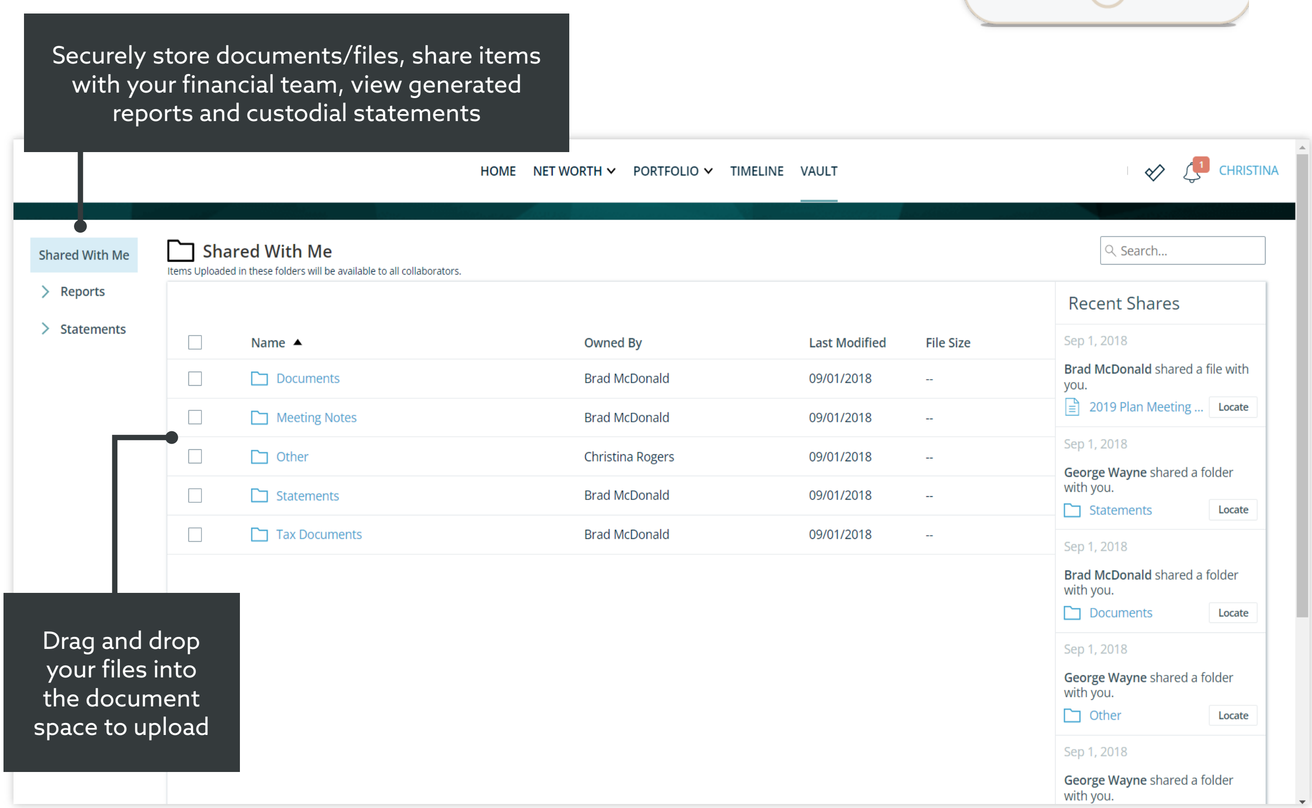
Securely sharing and managing documents is key to working with your wealth management team. The Vault page is where you can keep track of all your important financial and legal documents.

From here, you can organize your documents into folders, drag-and-drop to upload new documents, and easily move files from one folder to another.

The Vault is also an area where we can share documents through the Shared Folders option.

From the Statements and Reports folders, you can view investment-focused reports created by your financial team.





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Appendix

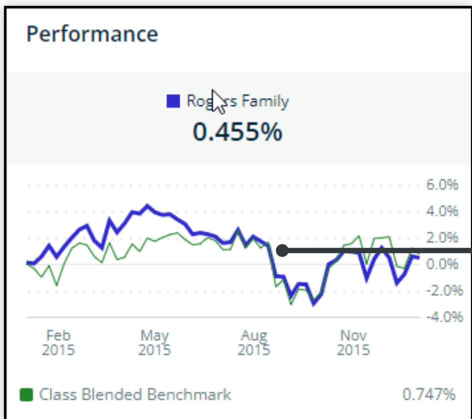
Mobile Application

Easily download the Client Experience from the Apple App Store or Google Play.

Performance Card

View investment performance across your portfolio.

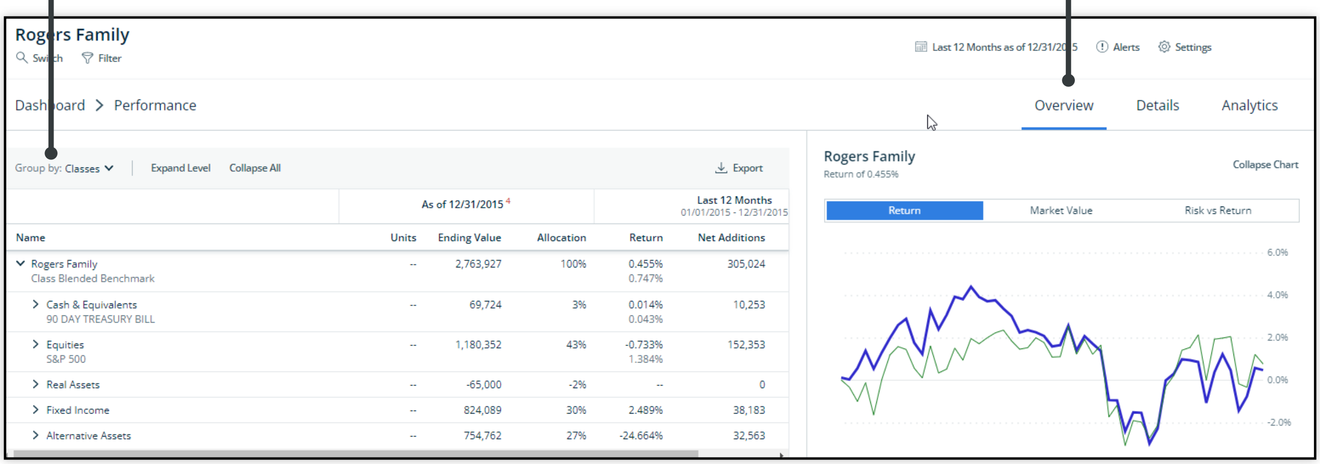
(Consolidated view)



Hover to view returns through a specific date

Expand and collapse the grouped sections

Change your view to see multiple date ranges or market analytics



	As of 12/31/2015[4]			Last 12 Months 01/01/2015 - 12/31/2015	
Name	Units	Ending Value	Allocation	Return	Net Additions
Rogers Family Class Blended Benchmark	--	2,763,927	100%	0.455% 0.747%	305,024
Cash & Equivalents 90 DAY TREASURY BILL	--	69,724	3%	0.014% 0.043%	10,253
Equities S&P 500	--	1,180,352	43%	-0.733% 1.384%	152,353
Real Assets	--	-65,000	-2%	--	0
Fixed Income	--	824,089	30%	2.489%	38,183
Alternative Assets	--	754,762	27%	-24.664%	32,563

(Expanded view)

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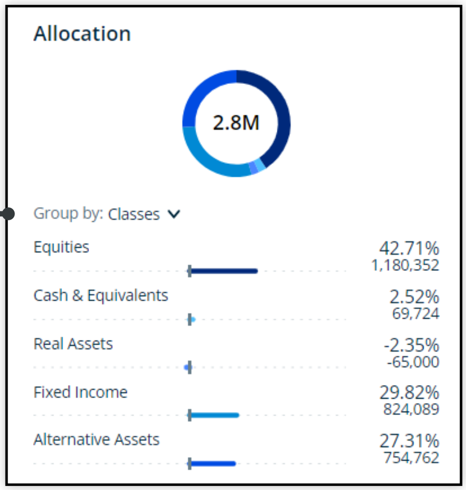
Allocation

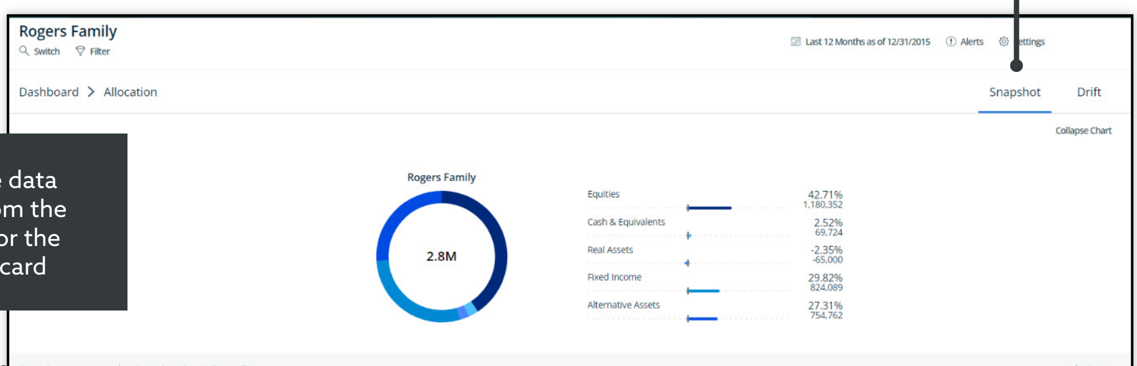
View the allocation breakdown of your portfolio.

(Consolidated view)



Toggle your view between a single day Snapshot and a Drift chart for allocation over time

Change the data grouping from the dashboard or the expanded card



Name	Symbol	Units	Allocation of Total	Ending Value
Rogers Family	--	--	100%	2,763,927
Cash & Equivalents	--	--	3%	69,724
Equities	--	--	43%	1,180,352
Real Assets	--	--	-2%	-65,000
Fixed Income	--	--	30%	824,089
Alternative Assets	--	--	27%	754,762

(Expanded view)

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Activity Summary

View activity and changes in your portfolio or account balance.

(Consolidated view)

Hover over graph to view net addition and market value information for a specific date

View breakout of additions and withdrawals. Contributions and withdrawls may be exported to view in further detail.

See income and performance breakouts

(Expanded view)

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Transactions

View and filter the most recent transactions in your portfolio.

(Consolidated view)

Transactions >

Date	Type - Symbol	Amount
12/31/13	Management Fee - CASH	-12,871
12/31/13	Management Fee - CASH	-34,083
12/31/13	Dividend - FTEXX	3
12/31/13	Management Fee - CASH	-37,311
12/31/13	Income Reinvestment - SCHWAB...	0
12/31/13	Management Fee - CASH	-325
12/31/13	Interest - FCASH	0
12/31/13	Capital Gains - DXJ	237
12/31/13	Capital Gains - DXJ	99
12/31/13	Dividend - DXJ	201

Filter by transaction (available filters are determined by your advisor)

Settings

Supervised Filter
All Assets | Supervised Only | Unsupervised Only

Sort column headers to quickly organize your transactions

Rogers Family
Switch Filter

Month To Date as of 12/31/2013 Alerts Settings

Dashboard > Transactions

Filter Export

Date ▼	Account No.	Account Name	Type	Asset Name	Symbol	Units	Price	Amount
12/31/2013	XXXXX9539	Rogers 529	Management Fee	CASH	CASH	--	--	-25.00
12/31/2013	XXXXX9539	Rogers 529	Dividend	TCW RELATIVE VALUE DIVIDEND APPREC N	TGIGX	--	--	21.84
12/31/2013	XXXXX9539	Rogers 529	Income Reinvestment	GENERAL MONEY MKT FD INC DREYFUS MMKT SVC	GMBXX	0.04	1.00	0.04
12/31/2013	XXXXX9539	Rogers 529	Dividend	GENERAL MONEY MKT FD INC DREYFUS MMKT SVC	GMBXX	--	--	0.04
12/31/2013	XXXXX9539	Rogers 529	Buy	GENERAL MONEY MKT FD INC DREYFUS MMKT SVC	GMBXX	--	--	0.04
12/31/2013	XXXXX1639	Rogers Irrevocable Trust	Management Fee	CASH	CASH	--	--	-25.00
12/31/2013	XXXXX2263	Rogers Family Trust	Interest	FCASH	FCASH	--	--	3.34
12/31/2013	XXXXX2263	Rogers Family Trust	Dividend Reinvestment	FCASH	FCASH	3.34	1.00	3.34
12/31/2013	XXXXX2263	Rogers Family Trust	Buy	FCASH	FCASH	14,857.03	1.00	14,857.03
12/31/2013	XXXXX2263	Rogers Family Trust	Sale	DOUBLELINE TOTAL RETURN BOND I	DBLTX	1,371.62	10.81	-14,857.03

(Expanded view)

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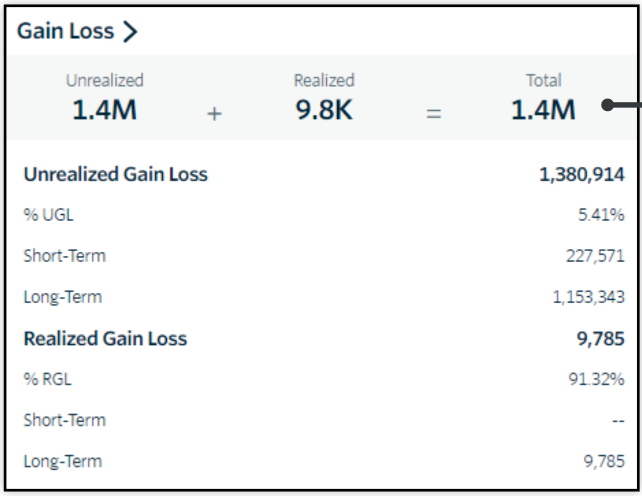
Gain/Loss

View realized and unrealized gain/loss information for your investments.

(Consolidated view)



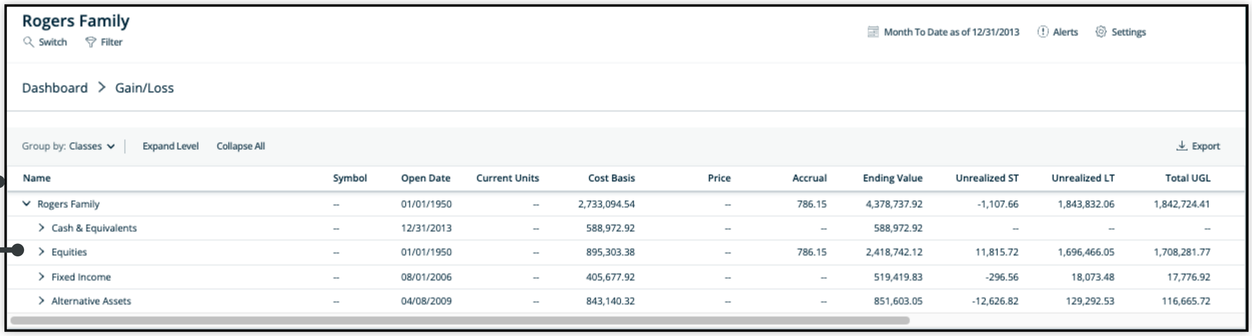
Gain Loss >

Unrealized		Realized		Total
1.4M	+	9.8K	=	1.4M

Unrealized Gain Loss	**1,380,914**
% UGL	5.41%
Short-Term	227,571
Long-Term	1,153,343
Realized Gain Loss	**9,785**
% RGL	91.32%
Short-Term	--
Long-Term	9,785

View your high level gain/loss breakdown from the dashboard

Sort column headers to quickly organize your cost basis information



Rogers Family

Switch Filter

Month To Date as of 12/31/2013 Alerts Settings

Dashboard > Gain/Loss

Group by: Classes | Expand Level Collapse All Export

Name	Symbol	Open Date	Current Units	Cost Basis	Price	Accrual	Ending Value	Unrealized ST	Unrealized LT	Total UGL
Rogers Family	--	01/01/1950	--	2,733,094.54	--	786.15	4,378,737.92	-1,107.66	1,843,832.06	1,842,724.41
Cash & Equivalents	--	12/31/2013	--	588,972.92	--	--	588,972.92	--	--	--
Equities	--	01/01/1950	--	895,303.38	--	786.15	2,418,742.12	11,815.72	1,696,466.05	1,708,281.77
Fixed Income	--	08/01/2006	--	405,677.92	--	--	519,419.83	-296.56	18,073.48	17,776.92
Alternative Assets	--	04/08/2009	--	843,140.32	--	--	851,603.05	-12,626.82	129,292.53	116,665.72

(Expanded view)

Expand and collapse the grouped sections

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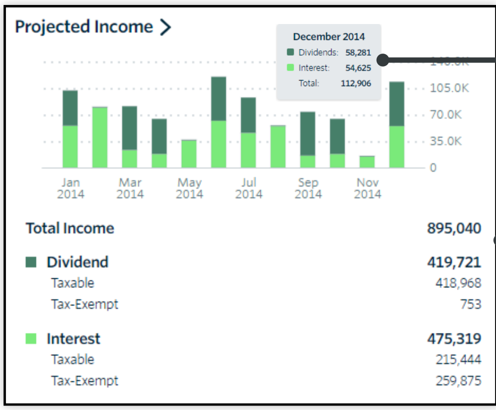
Projected Income

Review a snapshot of expected dividend and interest payments.

(Consolidated view)



Hover over graph to view net addition and market value information for a specific date

The card displays total projected income for the selected time period, a breakout of projected dividends and interest, plus a month-by-month bar chart

Choose between viewing projected income for the Next 12 Months or the Remainder of Year

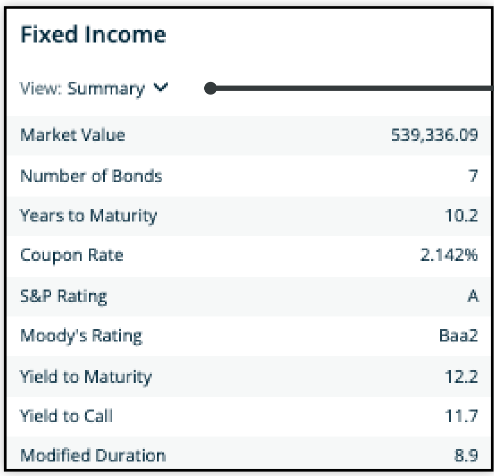
View projected income at your grouped level

(Expanded view)

Fixed Income

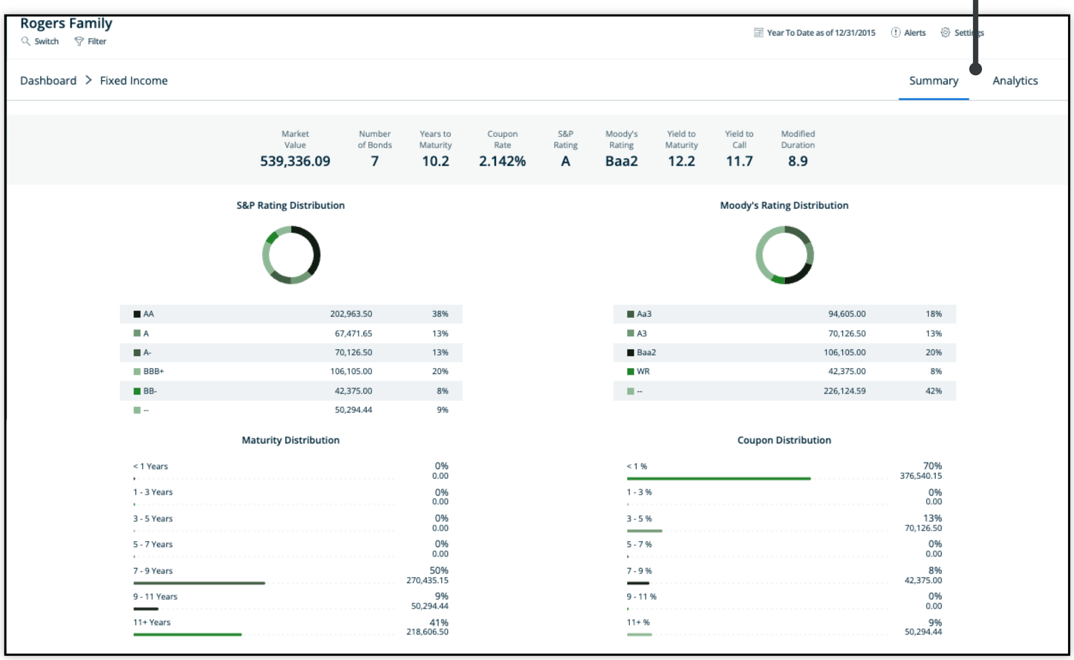
Review a snapshot of fixed income holdings in your portfolio.

(Consolidated view)



The card displays important statistics about your Fixed Income. Different options to select in the dropdown include Ratings, Maturity or Coupon Distribution graphs, and pie charts of the bonds' ratings.

Toggle between a summary page and analytical data associated with your fixed income holdings



(Expanded view)

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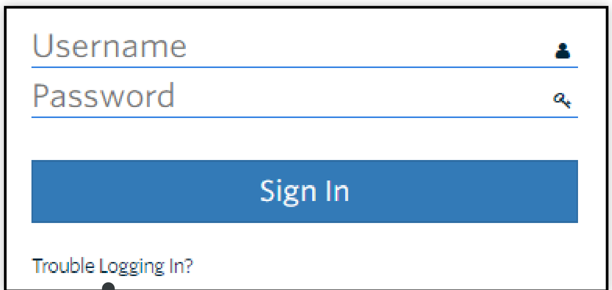
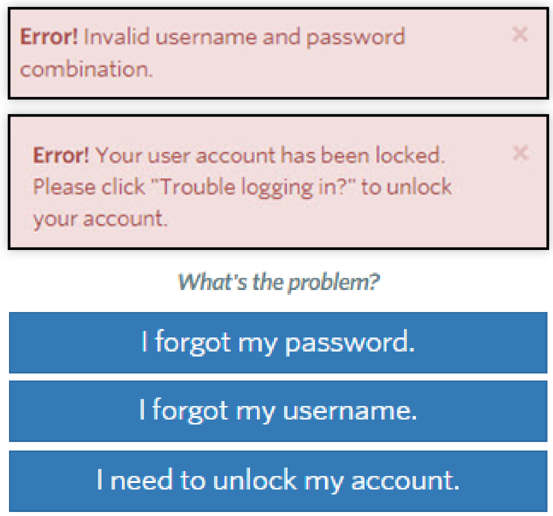
Login Problems

Please follow these directions if you need help signing into the site.

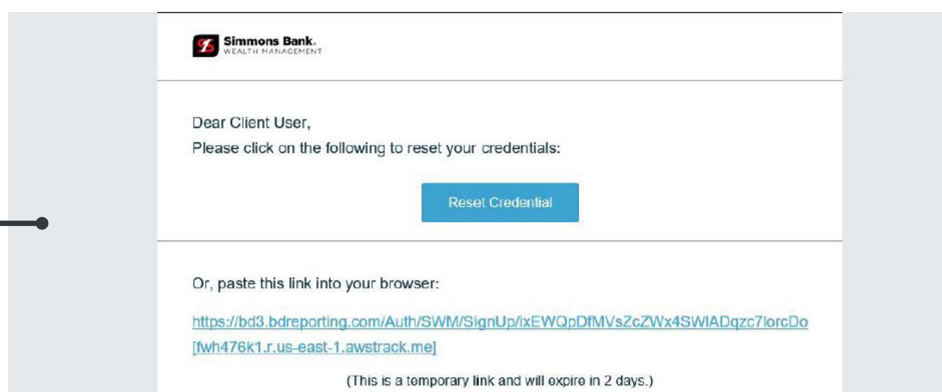


1. Select "Trouble logging in?" on the sign-in page for help



2. Select the option you need assistance with

3. You will receive an email with a link to access the site. Follow the steps provided to resolve login issues.



Your personalized portal keeps you connected to your financial life, your advisory team, and everything else you need for managing your wealth.

If you have any questions, please contact your Account Strategist.

We are always here for you.