



## WE ARE THRILLED TO UNVEIL WELL-TH VIEW, OUR NEW CLIENT PORTAL!

Seamless connectivity. An accessible, 360 degree view of your financial picture. Intuitive, personalized design. These were our goals as we developed Well-th View - a notable step forward in our efforts to provide holistic financial clarity and ease of communication to you.

For detailed, step-by-step instructions on accessing the new Well-th View client portal, please reach out to us directly.

### HIGHLIGHTS:

- A single, unified access interface to all of your financial data through Well-th View
- Direct and transparent collaboration with us, including document sharing and note tracking, through the Well-th Vault
- A personalized experience designed to provide you with the most relevant insights, information and updates on your financial journey

### THE NEW WELL-TH VIEW EXPERIENCE

**Single, unified sign-on to all of your portals, with enhanced security**

**Easily contact us by click to dial, click to email and schedule a meeting with any of us through the portal!**

**Streamlined access to financial data such as account performance, quarterly statements, tax information and more**

**Personalized, easy-to-use portal**

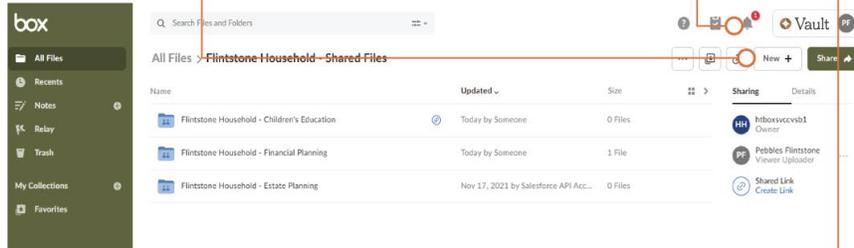
The screenshot shows the client portal interface with the following elements:

- Header: Falcon Wealth Advisors logo, address (1900 Shawnee Mission Parkway Ste. 210, Mission Woods, KS 66205), and user greeting (Welcome, Dawn Reitz Sign Out).
- Advisor Profiles: Jake Falcon (Founder and Wealth Advisor) and Cory Bittner (Co-Founder and Wealth Advisor) with contact information.
- Your Portals: Vault (Files shared by your Advisor, Share files with your Advisor), Performance (Portfolio Allocations, Account Holdings and Returns), and Plan (Organize your Goals and Priorities, Track your Spending).
- Your Information: Dawn Reitz contact details (Email Address: dawn@reizt.mp.com, Phone Number: 7045174496).
- Footer: Legal & Privacy, Legal Terms Of Use, Web Accessibility, Itelo, and registration information for Hightower Securities, LLC.

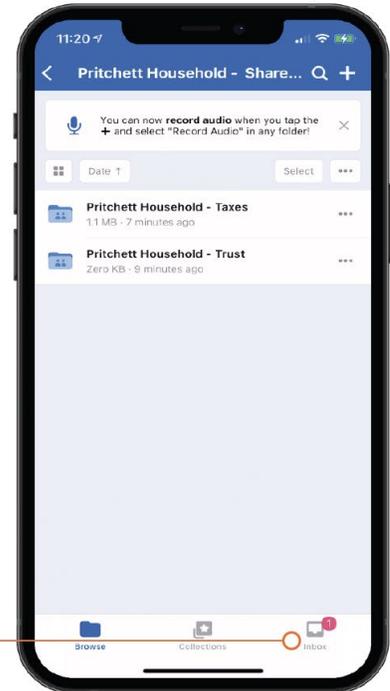
For Illustrative Purposes Only

## COLLABORATE WITH US DIRECTLY IN THE WELL-TH VAULT

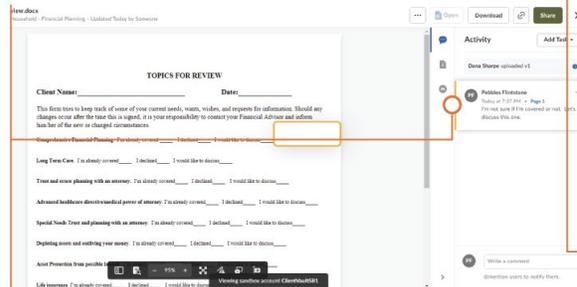
You can upload documents to share with us



Receive alerts in the app and notifications on your phone



We can share documents, engage in back-and-forth dialogue, track activities, ask questions and take notes about your documents through the Well-th Vault



*For Illustrative Purposes Only*

We are excited for you to experience the new Well-th View portal. Please reach out to us directly for instructions to log in and set up your account today!