

# WELL-TH VIEW CLIENT PORTAL

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To further the mission of providing holistic financial clarity and streamlined communication to our clients, we have enhanced the Well-th View client portal with these goals in mind: seamless connectivity, an accessible 360-degree view of your financial picture and intuitive personalized design.

*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 your financial data through Well-th View
  - Direct and transparent collaboration with us, including document sharing and note tracking, through the Well-th Vault
  - All financial documents in a centralized location, the Well-th Vault
  - A personalized experience crafted to deliver the most relevant insights, information and updates on your financial journey
  - Account details offering a comprehensive list of your accounts, showcasing balances and custodians
  - Allocation details provides holdings grouped by asset classification
  - The Insights feature enables you to read articles shared or written by your advisor, enriching your financial literacy
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# THE WELL-TH VIEW EXPERIENCE

**A ACCOUNTS TILE**  
The Accounts tile displays a comprehensive list of your accounts, featuring balances and custodians. Click "See more accounts" for additional details or to access your Black Diamond portal.

**B ALLOCATION TILE**  
The Allocation tile displays holdings categorized by asset classification. Click "See Allocation Details" to access your Black Diamond portal.

**C WELL-TH VAULT - YOUR SHARED FILES**  
Click on "View Your Shared Files" to view your documents and those shared by us.

**D VIEW YOUR REPORT, TAX FORMS AND CUSTODIAL STATEMENTS**  
You now have full access to your quarterly reports, tax forms and custodial statements.

**E QUICK LINKS**  
Select the available shortcut to quickly access various services.

**F INSIGHTS**  
The Insights feature allows you to view articles shared or authored by us. Click "Go to Article" to read the desired piece.

The dashboard features two user profiles at the top: Michael Bankston (Advisor) and Jessica Pinto (Client Services). Below them is the 'Accounts' tile showing a total value of \$3,145,501,864.03 and a table of 88 accounts. The 'Allocation' tile shows a total of \$3.1B with a pie chart and a list of asset classes. The 'Vault' tile contains 'View Your Shared Files' and 'Reports, Tax Forms, and Custodial Statements'. The 'Plan' tile lists 'Organize your Goals and Priorities' and 'Track your Spending'. The 'Quick Links' tile shows 'Schwab' and 'Pershing' portals. The 'Insights' tile features 'Weekly Wisdom' and 'Market Note' articles.

Account Name	Custodian	Value	As of Date
JoshTest8	Manual Account	\$2,950,803,242.00	10/19/2017
JoshTest10	Manual Account	\$100,210,000.00	10/19/2017
JoshTest9	Manual Account	\$31,347,949.00	10/19/2017

Asset Class	Percentage	Value
Equity	97.77%	(\$3.0B)
Balanced	1.15%	(\$35.9M)
Global Fixed Income	0.35%	(\$11.0M)
Alternative Assets	0.18%	(\$5.7M)
Unclassified	0.31%	(\$9.7M)

**D1 PORTFOLIO REPORTS AND STATEMENTS**  
To access your Black Diamond reports and statements, simply click on the dropdown menu. From there, you can choose to view them directly on your screen or download them to your device.

**D2 TAX FORMS**  
To access your tax documents, click on the dropdown menu, where they will be displayed by year. You can either view them directly on your screen or download them to your device.

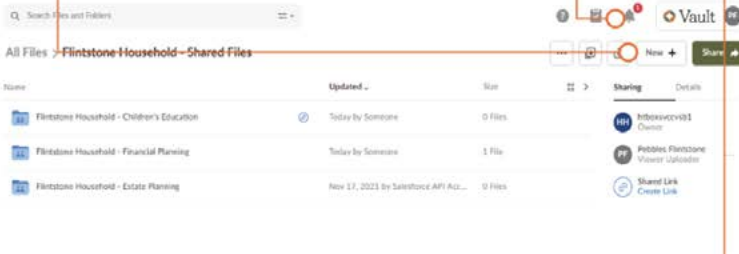
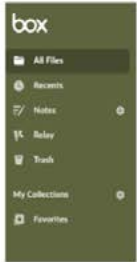
**D3 CUSTODIAL STATEMENTS**  
To access your custodial statements, click on the dropdown menu, where you can view them by year. You can either view them directly on your screen or download them to your device.

The 'Vault' dropdown menu is open, showing three categories: 'Portfolio Reports and Statements (17)', 'Tax Forms (1)', and 'Custodial Statements (803)'. A 'Home' button is visible in the top right corner of the dropdown.

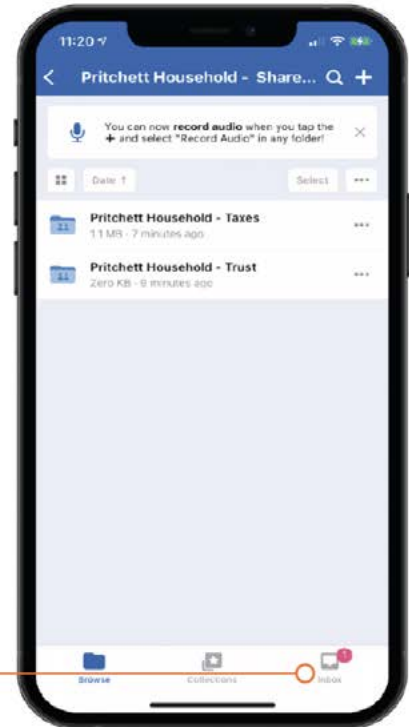
# COLLABORATE WITH US DIRECTLY IN THE WELL-TH VAULT

## View Your Shared Files

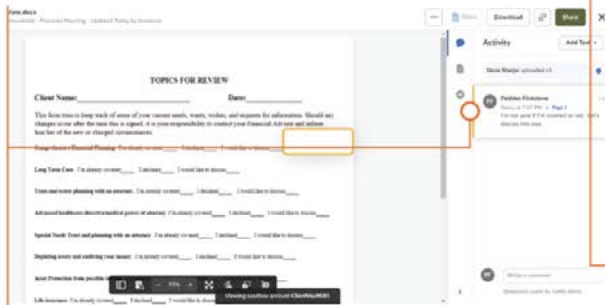
You can upload documents to share with us



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



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