SIGNATUREFD

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QUICK START GUIDE TO NAVIGATING THE PORTFOLIO DASHBOARD

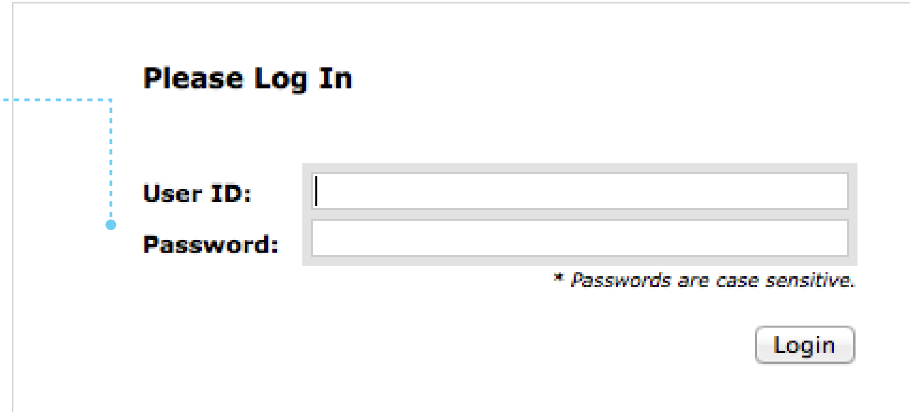
The Portfolio Dashboard provides access to your portfolio information. You will be able to access quarterly and monthly statements and run up-to-date reports for your portfolio.

This Quick Start Guide includes basic navigation and report information; your available options may vary.

Go to **www.signaturefd.com/client-login** using your Internet browser (Internet Explorer, Firefox, Safari, Google Chrome).

1. Logging In

Enter the user ID and temporary password provided by SignatureFD and click **Login.**

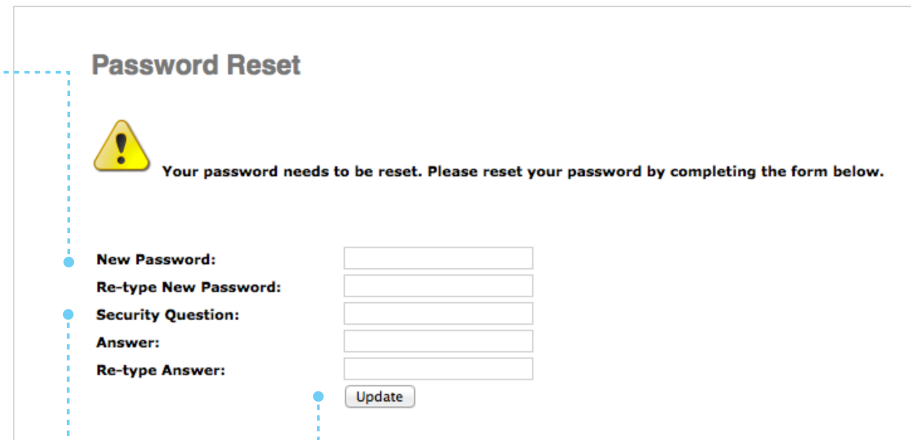


2. Password Reset

You will be prompted to reset your password after you enter the temporary password provided by SignatureFD.

Please note: A password must meet the following requirements:

- Has a minimum of 8 characters
- Includes at least a number and/or a special character (*! $ % ( ) = * + # ' - _ . : @*)
- Does not use "password" or any variation of the word



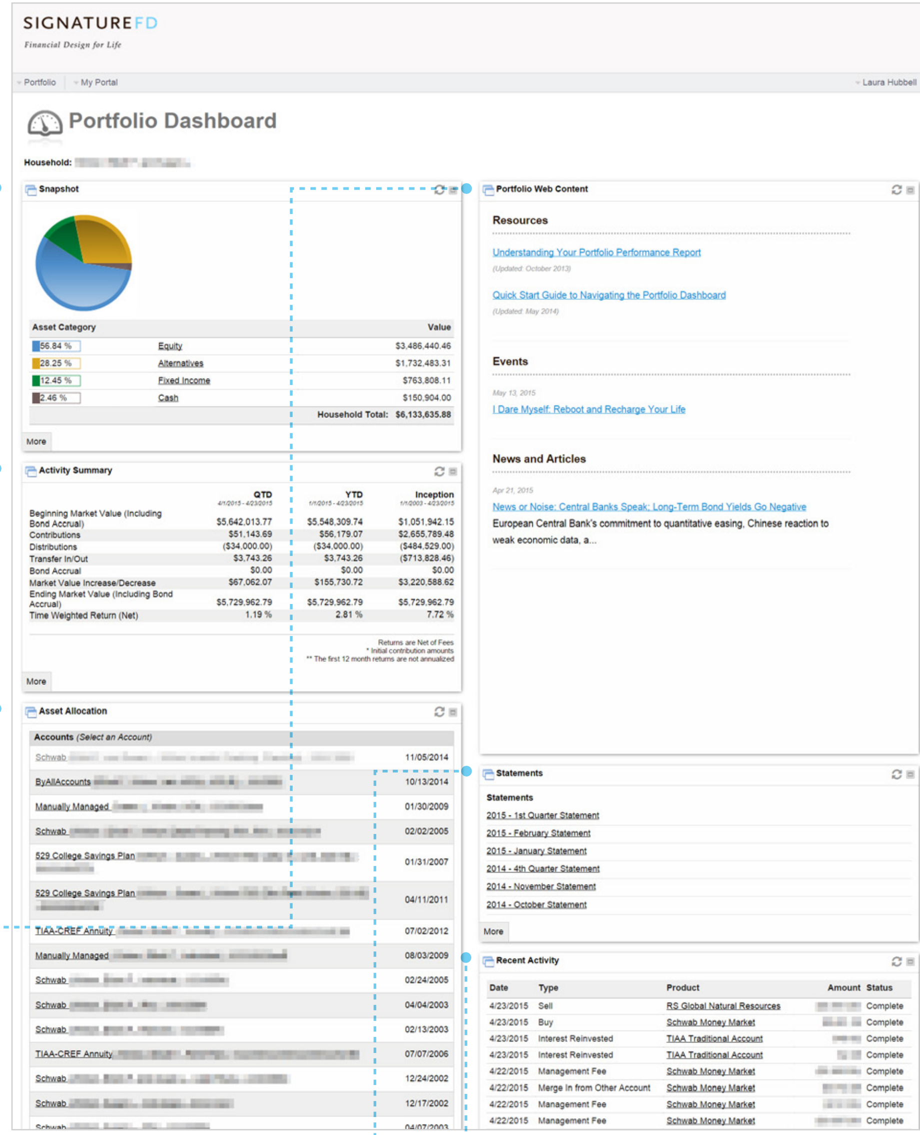
3. Security Question and Answer

Choose a security question and answer that are easy for you to remember in the event you need to reset your password in the future.

4. Access the Portfolio Dashboard

Click **Update** and navigate within the portfolio dashboard to your desired location.

Your one-stop portfolio review.



1. Snapshot

This chart shows the portfolio's current allocation across asset classes. Please note that these figures include any unmanaged accounts or assets.

2. Activity Summary

Shows account value and performance information at a glance.

3. Asset Allocation

Select an account to view detailed allocation percentages and values.

4. Portfolio Web Content

The Portfolio Web Content section will display recent SignatureFD news and information. You can also find links to helpful documents, including this guide.

5. Statements

You can click on a recent monthly or quarterly statement to view it in PDF format.

6. Recent Activity

The most recent transactions in your portfolio are displayed here.

More

Select **More** on any section on the dashboard to see more detail related to the information displayed.

PORTFOLIO MENU

The Portfolio Dashboard provides access to your portfolio information. You will be able to access quarterly and monthly statements and run up-to-date reports for your portfolio.

1. Dashboard and Portfolio Dashboard

Clicking here will bring you back to the main page, which provides a quick overview of up-to-date portfolio information.

2. Custom Portfolio Performance Report

Here you can run a PDF or Excel report showing performance information for a custom date range. You can find instructions on how to choose dates and file format on the next page of this document. The document "Understanding Your Portfolio Performance Report" provides a more detailed explanation of the information presented on the Custom Portfolio Performance Report.

3. Statements

The statements section will allow you to view recent monthly and quarterly statements prepared by SignatureFD.

4. Custom Portfolio Value Report

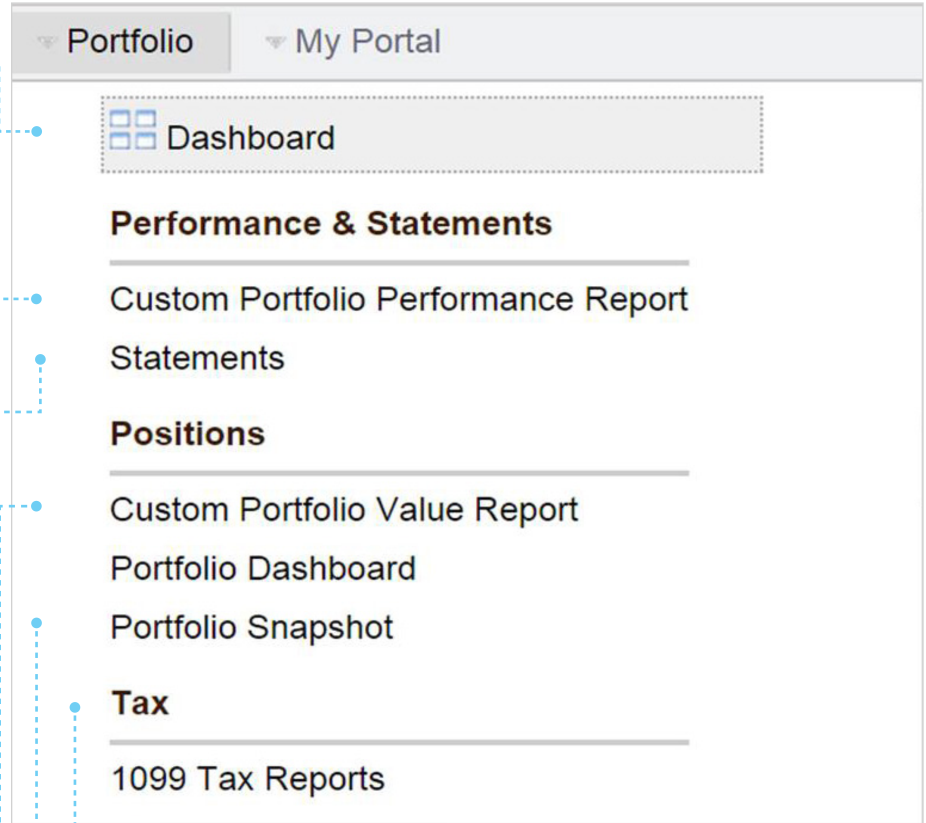
Here you can run a PDF or Excel report showing portfolio value and positions as of a custom date. You can find instructions on how to choose date and format on the next page of this document.

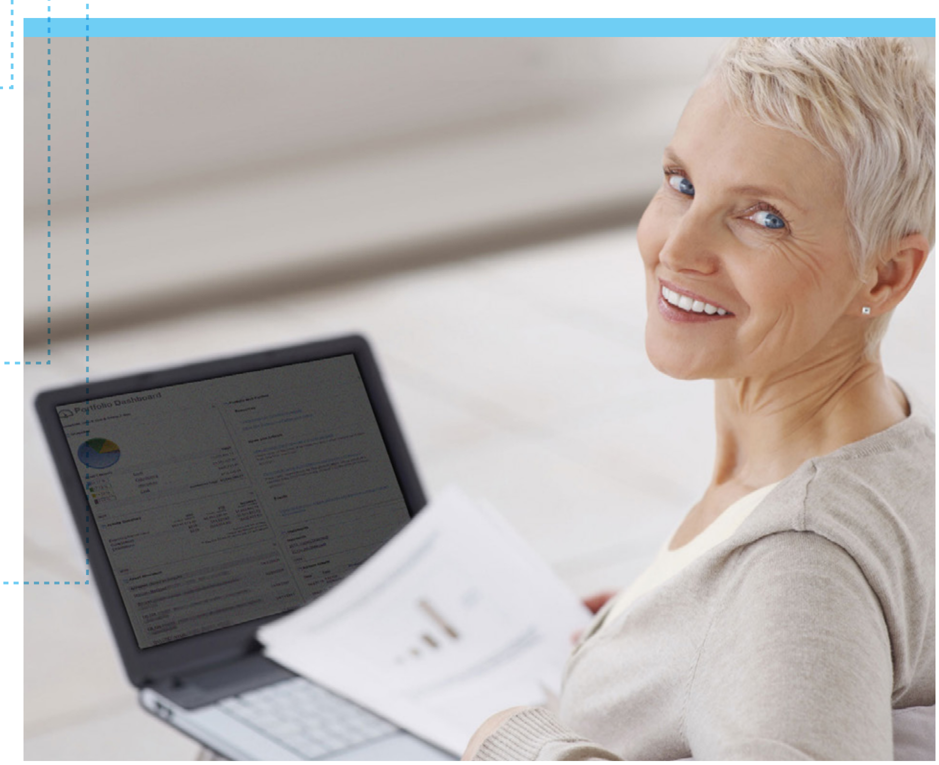
5. Portfolio Snapshot

This section will bring you to a Web page with detailed position and account information as of the current date.

6. Tax Reporting

Here you will find downloadable reports to aid you in tax preparation, including 1099s from custodians, K-1s from private funds, and SignatureFD account statements.





PORTFOLIO REPORTS OVERVIEW

Each portfolio report has parameters that you have the option to select or change before generating a report. Below are key highlights of these options.

1. Run For

Reports should generally be run at a household level, which will aggregate all accounts together. However, if you need to run a report on a particular account, you can select that account by clicking on the down arrow next to the portfolio title.

2. Date Range

Here you can select your date range by clicking on one of the preset date range options or by specifying your own custom dates.

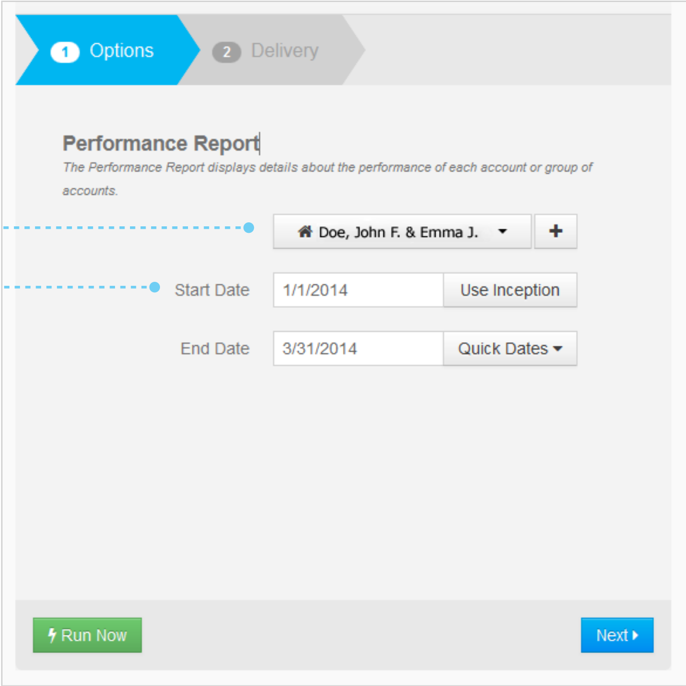
3. Delivery Method

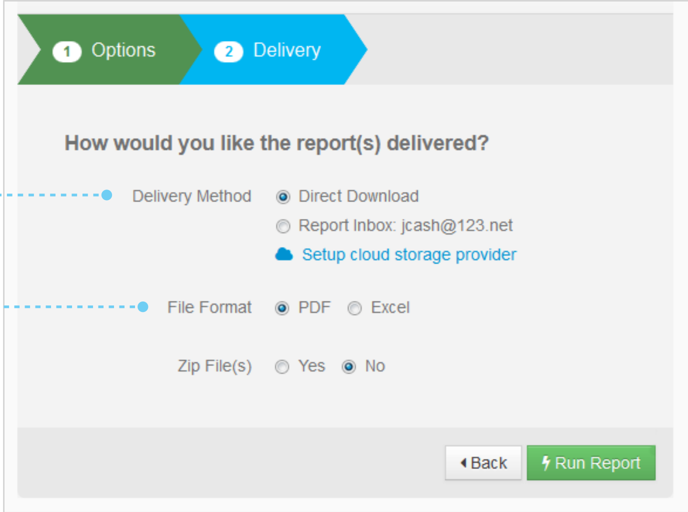
Select how you would like the report delivered:

- **Direct Download:** You download the report to your computer or other device.
- **Report Inbox:** The report will save to your Report Inbox under My Portal.
- **Cloud Storage:** You also have the option to set up a cloud storage provider to save your report.

4. Format

Choose to generate the report as a PDF or an Excel document. You can also choose whether you want the report delivered as a zip file.





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