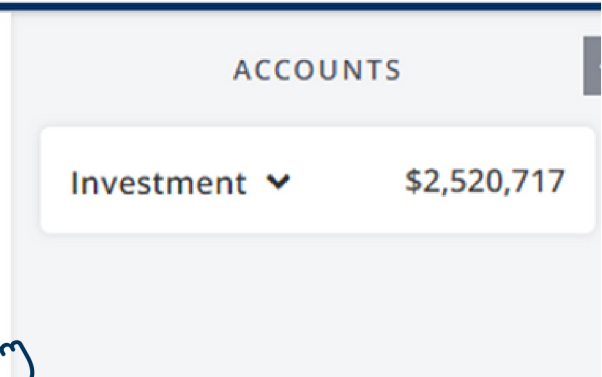


CLIENT PORTAL - ACCESSING DOCUMENTS

- Managed Accounts:
Positions, Performance, Cost Basis
- Your Financial Plan and Net Worth Statement
- Your uploads, and all Documents from TD Ameritrade, Schwab, and Astoria



Document Vault



**AFTER CLICKING THE DOCUMENT TAB
(FOLDER ICON - 3RD TAB AS SEEN ABOVE):**

Home
NAME
📁 1099 Tax Reports
📁 5498 Tax Reports
📁 Advisor Shared
📁 Custodial Statements
📁 Portfolio Statements



1099 Tax Documents directly from TD Ameritrade and Schwab



5498 Tax Documents directly from TD Ameritrade and Schwab



Document Vault that we have created & built with you (& your Tax Preparers/Attorneys if applicable). This is the folder to use when securely uploading documents.



Account Statements from TD Ameritrade and Schwab



Reports that we publish to you including Quarterly Statements and Tax Reports