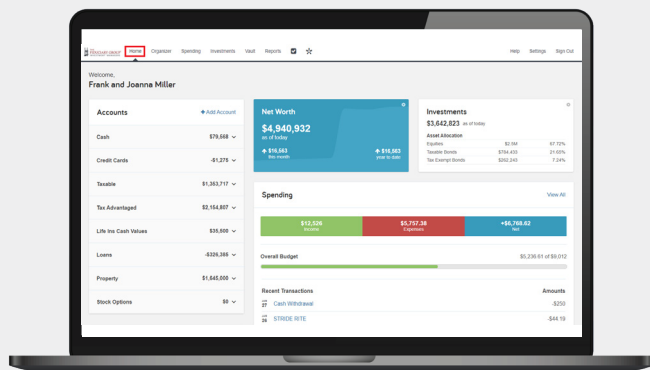


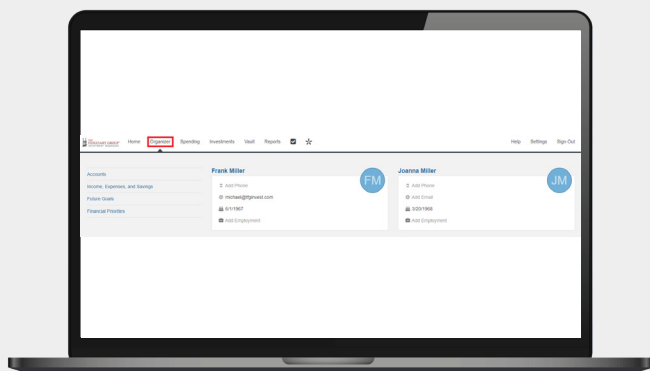
TFG Portal

This is an overview providing you with the tools to organize your financial situation. Stay connected with your finances in one simple consolidated view.



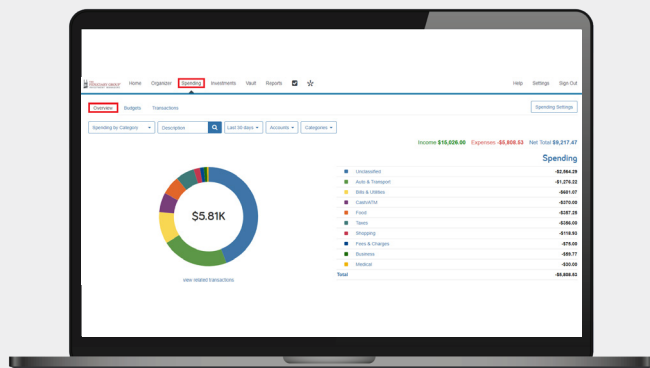
HOME PAGE

Your Home page is a live overview of your financial picture. This page is divided into separate tiles highlighting sections of the portal. Click a given tile to see additional details.



ORGANIZER TAB

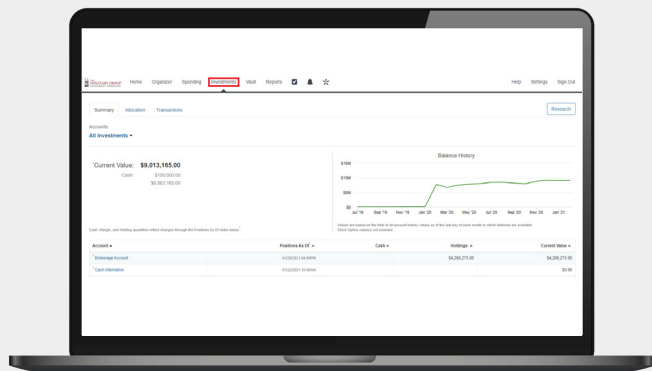
The Organizer tab consolidates important information into one place. You can add your accounts, financial data, family members, and property. This information helps populate other areas of the portal, including the Home page.



SPENDING TAB

The Spending tab displays spending data from linked accounts. Transactions are organized into categories to better understand spending each month. Individual transactions can be seen from the Transactions tab.

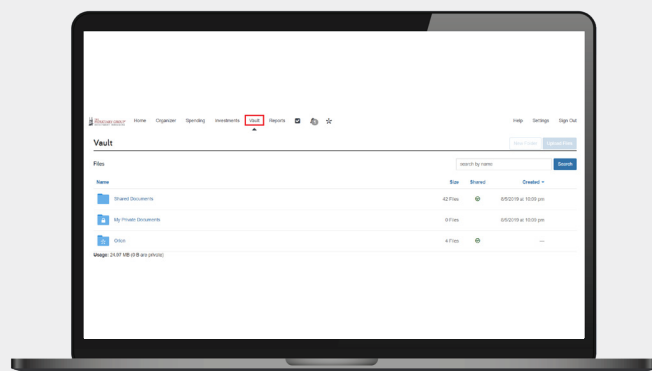
For additional information, visit tfginvest.com/client-portal.



INVESTMENTS TAB

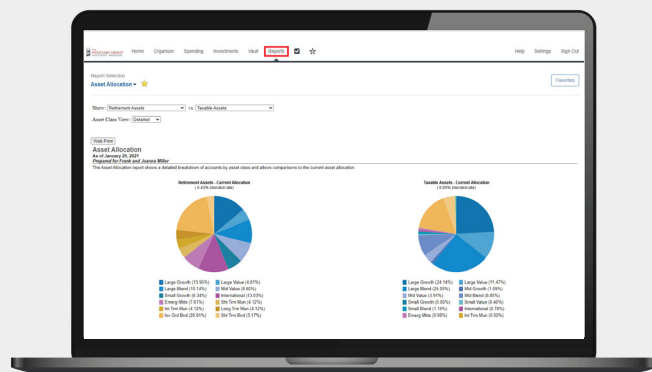
The Investments tab has four components: Summary, Allocation, Analysis and Transactions. These will provide an overall view of your investments, as well as the option to view individual accounts and asset details.

Note: This section does not include investment performance, which can be found by clicking the ✱ icon or viewing the quarterly performance reports.



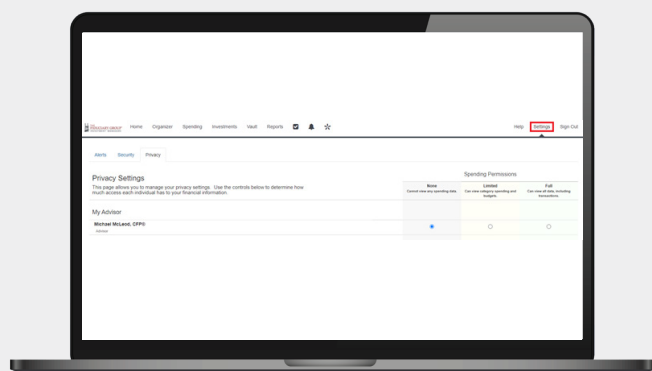
VAULT TAB

The Vault tab is a repository where files are stored by you and your advisor. To upload a file, click a folder, then the **Upload Files** link. Share key documents with your advisor by uploading them to the Shared Documents folder. Documents stored in the My Private Documents folder remain private.



REPORTS TAB

The Reports tab provides you with a series of reports about your financial situation.



SETTINGS TAB

The Settings page can manage alerts, login and security information (passwords, 2-factor authentication, security questions), and permission settings for your advisor to see spending information through the Privacy tab.