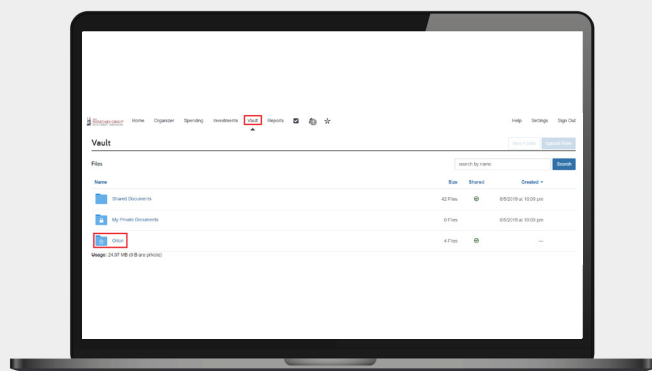
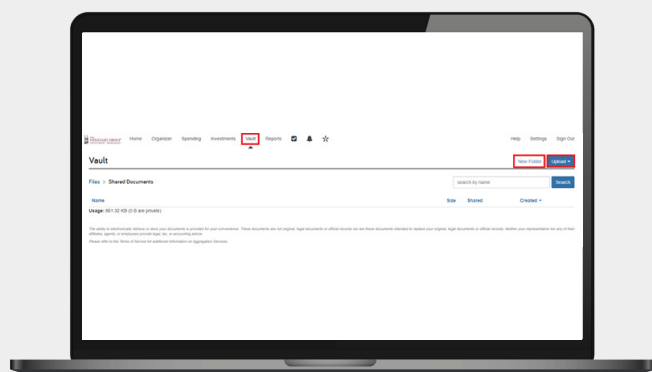


TFG Portal



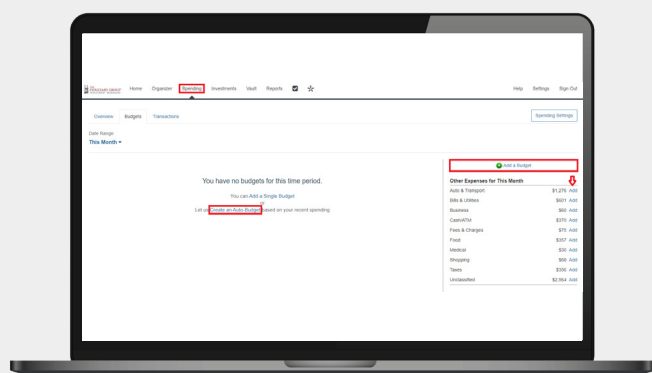
QUARTERLY STATEMENTS

The Fiduciary Group generates quarterly statements containing household and account allocations, positions, balances, and performance. These reports are accessible from within the TFG Portal. To access these statements, click the **Vault** tab, then click the **Orion** folder. You should see a list of quarterly statements, including the most recent version.



SHARED DOCUMENTS

The Vault can also be a collaborative tool between you and your advisor to share documents. Your advisor might save and share documents or reports through the vault, and you can do the same. Consider using the TFG Portal as a repository for important documents such as birth certificates, passport copies, wills or insurance documentation. From the **Vault** tab, click one of the shared folders, then click **Upload**, then **Files to Upload** and save documents within the folder.



MY PRIVATE DOCUMENTS

Having important personal documents easily accessible in one secure location can be both convenient and a helpful safety measure. Items uploaded to **My Private Documents** have the option not to be shared with your advisor, appearing without a check mark under the **Shared** column.

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