TSW WEALTH MANAGEMENT

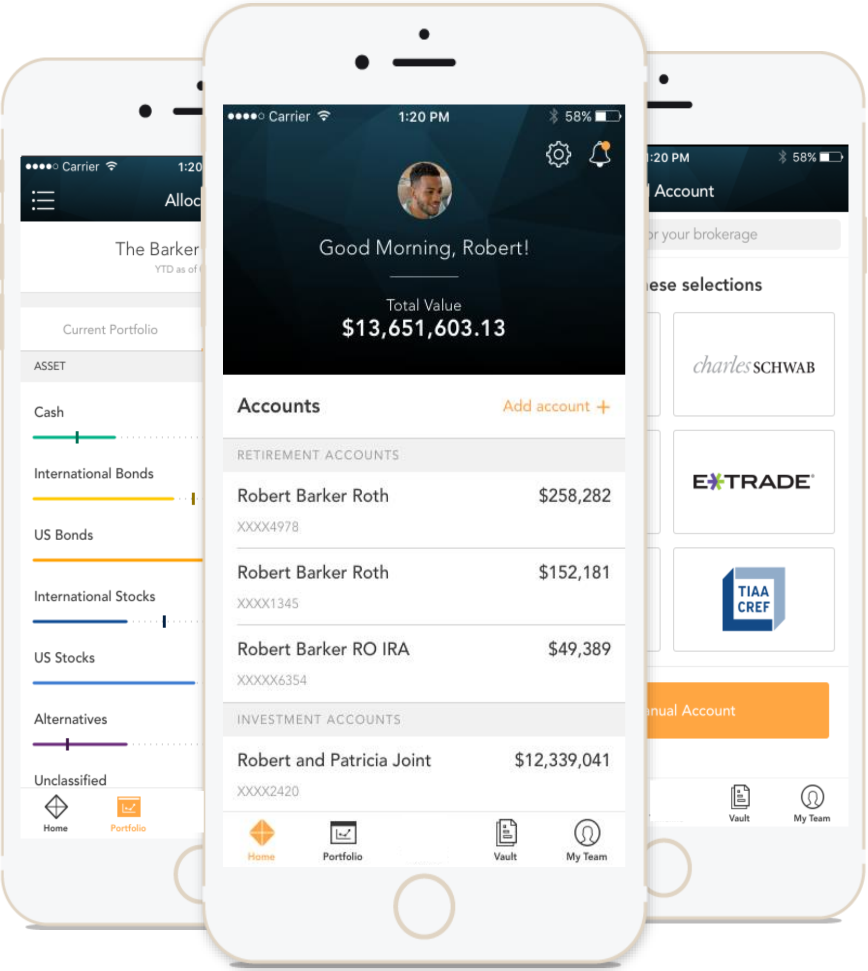
Welcome to your Mobile App

Personalized For You

From your phone or tablet you have:

- Fast access to your accounts and activity detail
- Easy to read overview of your balances
- Access to your performance reports and brokerage statements
- Ability to securely send/receive documents
- Quick access to call or email our office right from the app

…and more!

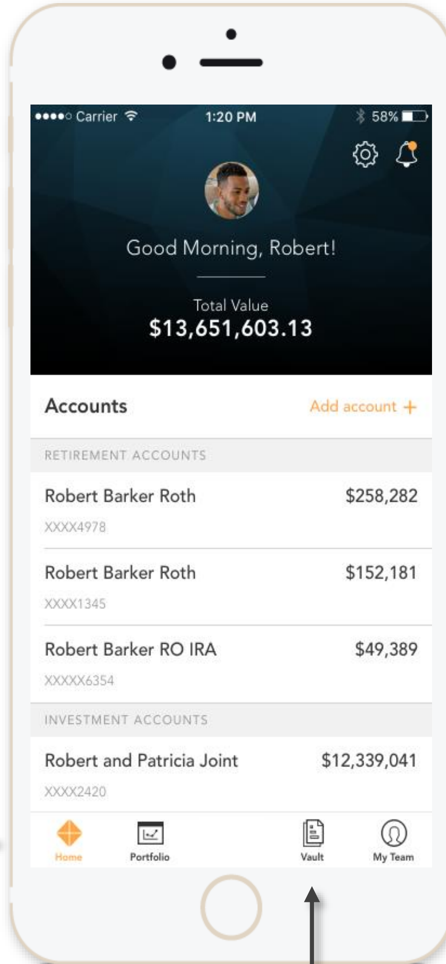


Stay Connected to Your Financial Picture

Home Page	At-a-glance view of your overall portfolio
Accounts	Detailed list of your accounts
Portfolio	Dynamic view of your assets, allocation and activity
Vault	Securely share and organize your important financial documents
Team	Contact your wealth management team with one click
App Download	Download the mobile app and get started

Home Page

Every time you log in, you'll see your personalized home page



Your accounts and total portfolio value are listed front and center

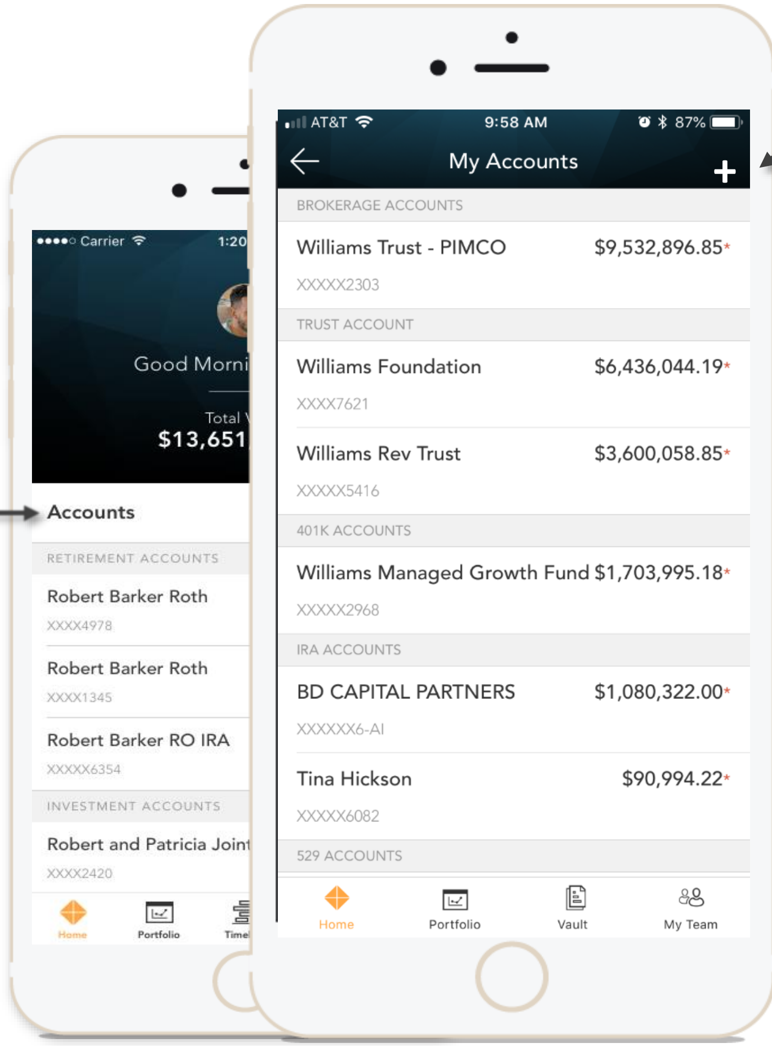
Across the bottom, you have quick access to the other tabs of your portal

Stay connected to your financial team with direct clickable links to phone numbers and emails

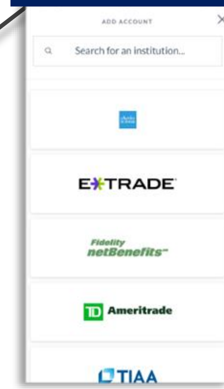
Send and receive documents utilizing the Vault feature directly within the portal

Accounts

From the Home page, you can click on *Accounts* to see a detailed list of all your accounts



Click + to add outside accounts to view your entire financial picture from one secure location



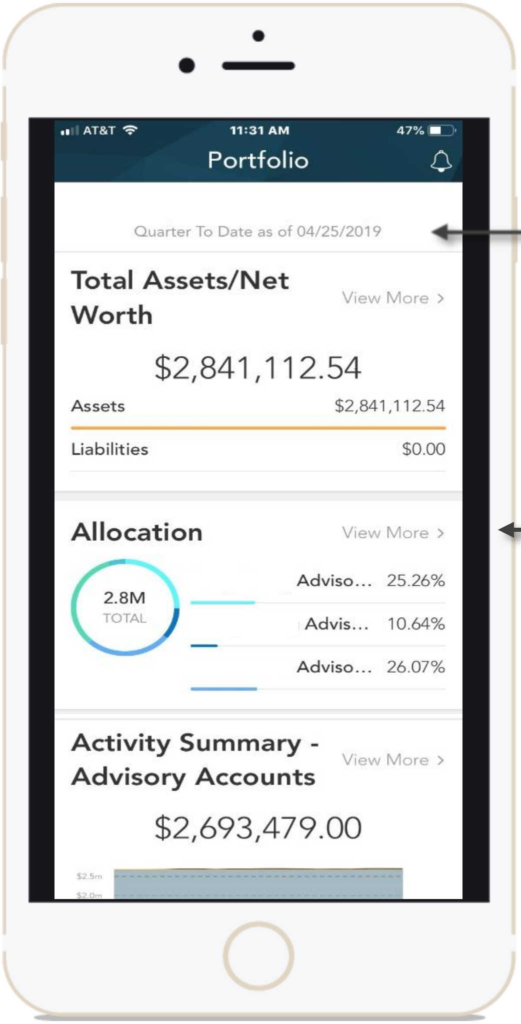
Balances are viewable at a glance

Expand each account to see your holdings, account details and activity

Portfolio

The Portfolio dashboard is where you can view additional details and analytics about your portfolio.

The dashboard gives you a dynamic overview of your portfolio with different cards highlighting key information



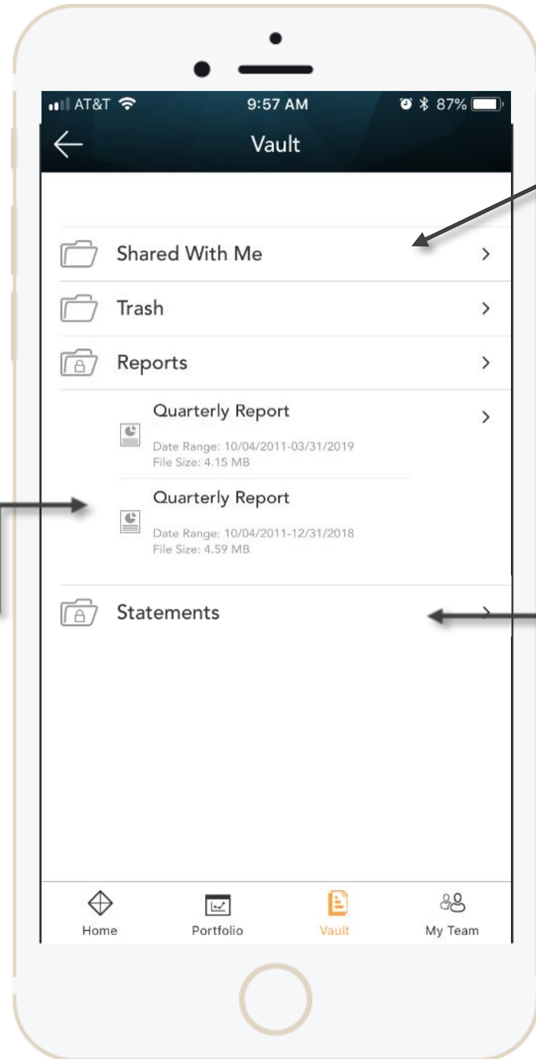
Use the filter feature to customize your view by specific date ranges or accounts

To get even more detail, you can click on the title or the "view more" option on each card

Vault

Securely sharing documents is key to working with your wealth management team.

The Vault tab helps you easily access and organize important financial reports and documents.



The *Shared* folder is where we can share documents with each other

View Advisory brokerage statements in the *Statements* Folder

The *Reports* folder gives you quick access to view your Advisory Quarterly & YTD Performance Reports

Team

Use the Team page to view your advisory and client service teams, and communicate directly from the app.

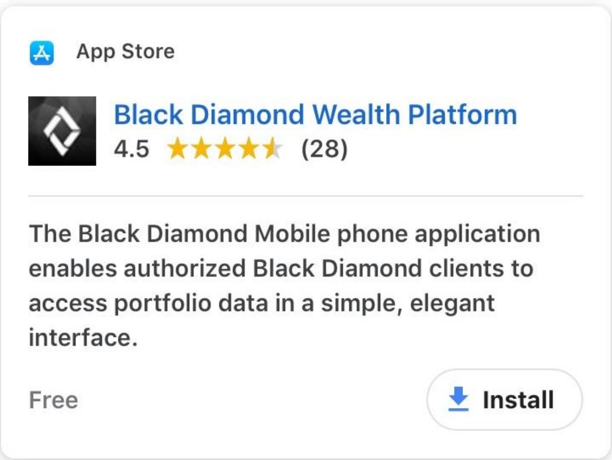
Call our office directly from your mobile device

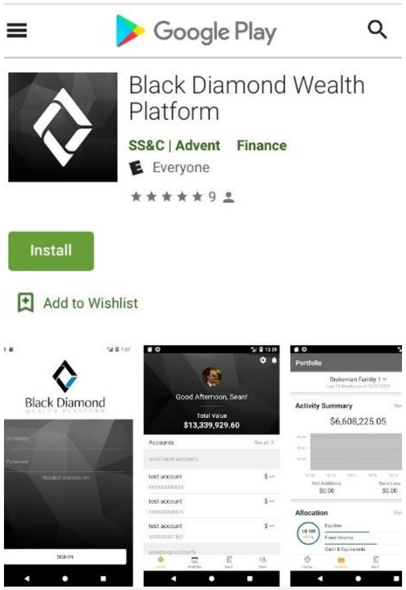
Email a member of your wealth management team with a single click

Utilize the Map feature to locate our office

Mobile Application

To get started, download the free Black Diamond App from the Apple App Store or Google Play





Your personalized portal keeps you connected to your financial life, your advisory team, and everything else you need for managing your wealth.

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If you have any questions, please contact us.
We are here to help.

TSW Wealth Management
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