



TSW WEALTH
MANAGEMENT

Welcome to your Client Portal

Home Page

TSW WEALTH MANAGEMENT

https://www.tswmanagement.com

Financial Team



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TSW WEALTH MANAGEMENT

HOME NET WORTH ▼ PORTFOLIO ▼ VAULT ▼

Client

GOOD AFTERNOON,
Client

TOTAL VALUE
\$2,265,811

Accounts

NAME	MARKET VALUE
Bill and Savannah Bucks Advisory Joint Tena...	\$65,039 08/04/2026
Bill Bucks Advisory IRA	\$1,064,192 08/04/2026
MMKT Savings Bank of America	\$235 08/04/2026
Savannah Bucks Advisory ROTH	\$14,340 08/04/2026
Savannah Bucks Advisory 403b	\$471,560 08/04/2026
Savannah Bucks Advisory IRA	\$650,446 08/04/2026

About Us

Whether you're building wealth or already transitioned into retirement, we are there for you through life's big financial milestones.

Helpful Company Links



Top Holdings

STATE STREET SPDR PORTFOLIO S&...	15%
SPYM	
ISHARES RUSSELL 1000 LARGE-CAP I...	8%
BRGX	
ISHARES 10-20 YEAR TREASURY BON...	
TLH	
STATE STREET SPDR PORTFOLIO S&...	6%
SPYG	
STATE STREET SPDR PORTFOLIO S&...	5%
SPYV	
ISHARES U.S. EQUITY FACTOR ROTA...	5%
DYNF	

Quickly view your accounts as an aggregate total or grouped by category

View notifications from our office and system updates

Update your personal account settings including passwords, security and more

Link to Schwab Alliance

Email a member of our team directly

View your top holdings at a glance

Net Worth

The screenshot shows the TSW Wealth Management interface. At the top, the navigation bar includes 'HOME', 'NET WORTH' (selected), 'PORTFOLIO', and 'VAULT'. The 'Accounts' tab is active, displaying a total net worth of \$2,265,811. A table lists six accounts with their custodians, values, and last updated dates. Annotations highlight the 'Add Account' button, the 'Expand' icon in the account list, and a modal for connecting to financial institutions.

TSW WEALTH MANAGEMENT

HOME NET WORTH PORTFOLIO VAULT

Accounts

\$2,265,811
Total Value

6 Accounts

Add outside accounts to view your entire financial picture from one secure location

Expand to see the detail of your holdings in each account

Add Account

Connect to your financial institution

Find your institution:

Search

Or choose from these popular institutions:

- Bank of America
- CHASE
- Fidelity
- Fidelity NetBenefits
- Merrill Lynch
- USAA
- Vanguard
- WELLS FARGO

Account Name	Custodian	Value	As of Date	Last Updated
> Bill Bucks Advisory IRA	Schwab	1,064,192	08/04/2026	--
> Savannah Bucks Advisory IRA	Schwab	650,446	08/04/2026	--
> Savannah Bucks Advisory 403b	TIAA	471,560	08/04/2026	--
> Bill and Savannah Bucks Advisory Joint Tenants	Schwab	65,039	08/04/2026	--
> Savannah Bucks Advisory ROTH	Schwab	14,340	08/04/2026	--
> MMT Savings Bank of America	Bank of America	235	08/04/2026	08/04/2026

Portfolio

TSW

WEALTH
MANAGEMENT

HOME

NET WORTH

PORTFOLIO

VAULT

Dashboard

Portfolio Allocation

Advisory Accounts - Activity Summary

Advisory Accounts - Transactions

Bucks Household

Switch Filter

Portfolio Allocation

2.3M

Group by: Account/Class

Bill and Savannah Bucks Advisory Joint Te...2.87%65,039

Advisory IRA46.97%1,064,192

Bucks Advisory IRA28.71%650,446

Bucks Advisory ROTH0.63%14,340

Savannah Bucks Advisory 403b20.81%471,560

Advisory Accounts - Activity Summary

2.8M2.1M1.4M700.0K0

20182020202220242026

Beginning Value0

Net Additions1,351,682

Gain/Loss913,895

Change In Accrued Interest0

Ending Value2,265,577

Advisory Accounts - Transactions

Filter (0)

Date	Type - Symbol	Amount
07/31/26	Buy-LAPIX	2,599.92
07/31/26	Sale-SHLD	-126.48
07/31/26	Sale-PBAIX	-69.96
07/31/26	Sale-VGIT	-116.54
07/31/26	Sale-BND	-72.17
07/31/26	Sale-TLT	-2,052.46
07/31/26	Sale-IEMG	-77.55
07/31/26	Dividend-LAPIX	0.26
07/31/26	Dividend-LAPIX	3.47
07/31/26	Dividend-PIMIX	134.36

Inception as of 08/04/2026

Alerts

Settings

Change the date range by clicking on the date

Select Dashboard for a more detailed view of your portfolio

Use the filter tool to select specific accounts

Click on the title of any card to expand to a full screen view

Portfolio Allocation



Group by: Account/Class

Bill and Savannah Bucks Advisory Joint Te...	2.87%	65,039
Advisory IRA	46.97%	1,064,192
Bucks Advisory IRA	28.71%	650,446
Bucks Advisory ROTH	0.63%	14,340
Savannah Bucks Advisory 403b	20.81%	471,560

Advisory Accounts - Activity Summary



Beginning Value	0
Net Additions	1,351,682
Gain/Loss	913,895
Change In Accrued Interest	0
Ending Value	2,265,577

Advisory Accounts - Transactions

Filter (0)		
Date	Type - Symbol	Amount
07/31/26	Buy-LAPIX	2,599.92
07/31/26	Sale-SHLD	-126.48
07/31/26	Sale-PBAIX	-69.96
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07/31/26	Dividend-LAPIX	0.26
07/31/26	Dividend-LAPIX	3.47
07/31/26	Dividend-PIMIX	134.36

Portfolio Allocation

View the allocation breakdown of your entire portfolio and individual accounts

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HOME

NET WORTH

PORTFOLIO

VAULT

Dashboard

Portfolio Allocation

Advisory Accounts - Activity Summary

Advisory Accounts - Transactions

Bucks Household

Switch Filter

Year To Date as of 08/04/2026 Alerts Settings

Dashboard > Portfolio Allocation

Collapse Chart

Bucks Household

2.3M

Bill and Savannah Bucks Advisory Joint Tenants

2.87%

65,039

Bill Bucks Advisory IRA

46.97%

1,064,192

Savannah Bucks Advisory IRA

28.71%

650,446

Savannah Bucks Advisory ROTH

0.63%

14,340

Savannah Bucks Advisory 403b

20.81%

471,560

< Previous

1 / 2

Next >

Group by: Account/Class

Expand Level

Collapse All

Name	Symbol
▼ Bucks Household	...
> Bill and Savannah Bucks Advisory Joint Tenants	...
> Bill Bucks Advisory IRA	...
> Savannah Bucks Advisory IRA	...
> Savannah Bucks Advisory ROTH	...
> Savannah Bucks Advisory 403b	...
> MMT Savings Bank of America	...

Portfolio Allocation

2.3M

Group by: Account/Class

Savannah Bucks Advisory IRA

Actual: 650,446

Weighting: 29%

Bill and Savannah Bucks Advis	2.87%	65,039
Bill Bucks Advisory IRA	46.97%	1,064,192
Savannah Bucks Advisory IRA	28.71%	650,446
Savannah Bucks Advisory ROTH	0.63%	14,340
Savannah Bucks Advisory 403b	20.81%	471,560

Export

of Total

100%

3%

47%

29%

1%

21%

0%

Hover over chart to view grouping level allocation detail

Change the data grouping from the dashboard or the expanded card

Advisory Accounts - Activity Summary

View activity details and changes in your portfolio

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HOME

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Dashboard

Portfolio Allocation

Advisory Accounts - Activity Summary

Advisory Accounts - Transactions

Year To Date as of 08/04/2026

Alerts

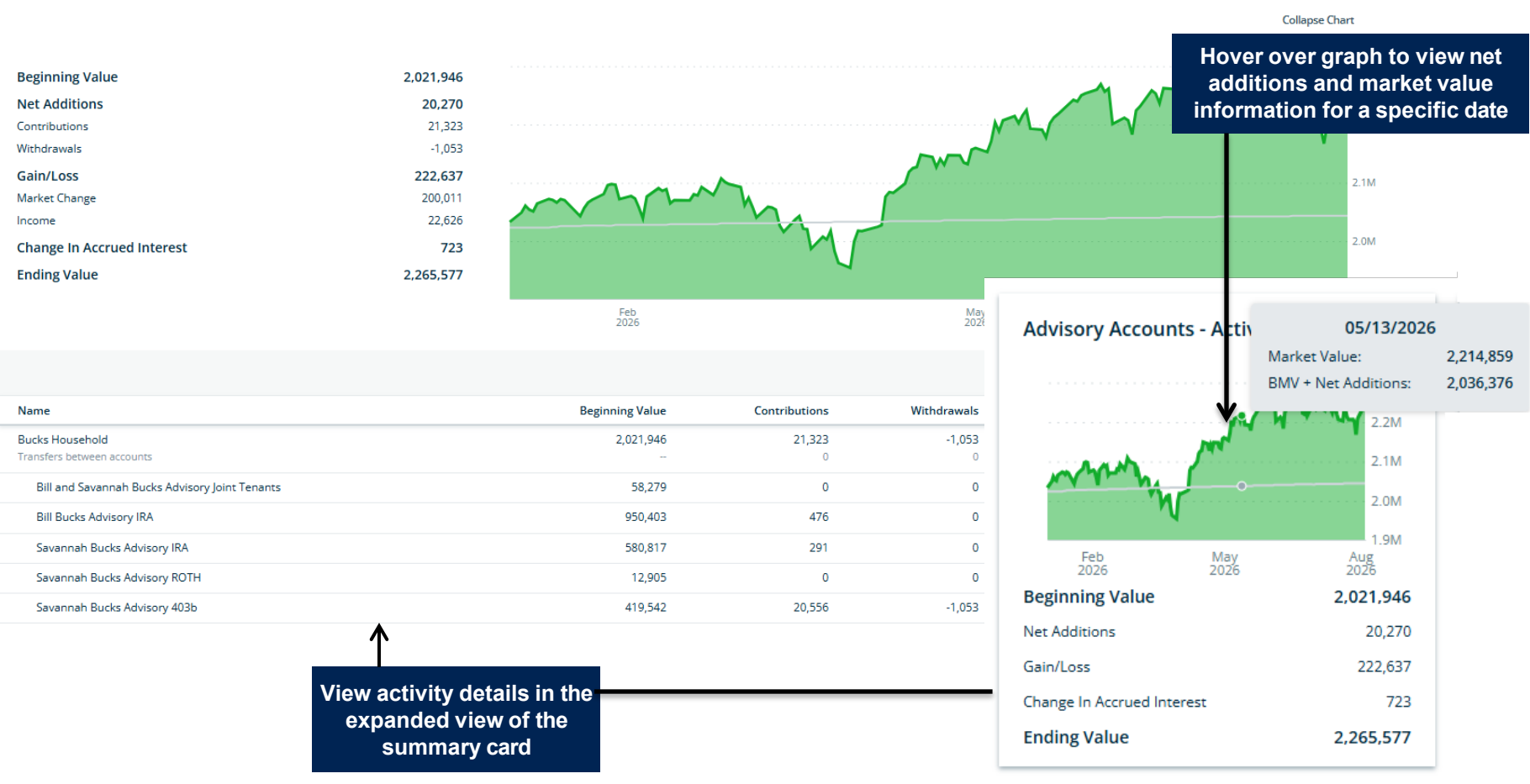
Settings

Bucks Household

SwitchFilter

Dashboard

Advisory Accounts - Activity Summary



Advisory Accounts - Transactions

View and filter the most recent transactions in your portfolio

Filter by account for an easier view

TSW WEALTH MANAGEMENT

HOME NET WORTH PORTFOLIO VAULT

Bucks Household

Switch Filter

Sort column headers to organize your transactions

Export data to an Excel Spreadsheet

Settings

Click on the Settings icon to filter by transaction type

Select All Unselect All

☐ Alternatives☐ Capital Gains

☐ Buys☐ Contributions

☐ Expenses☐ Income

☐ Management Fees☐ Journal

☐ Other☐ Sells

☐ Reinvestments☐ Withdrawals

☐ Account Transfers

Cancel Apply

Dashboard

Portfolio Allocation

Advisory Accounts - Activity Summary

Advisory Accounts - Transactions

as of 08/04/2026

Alerts

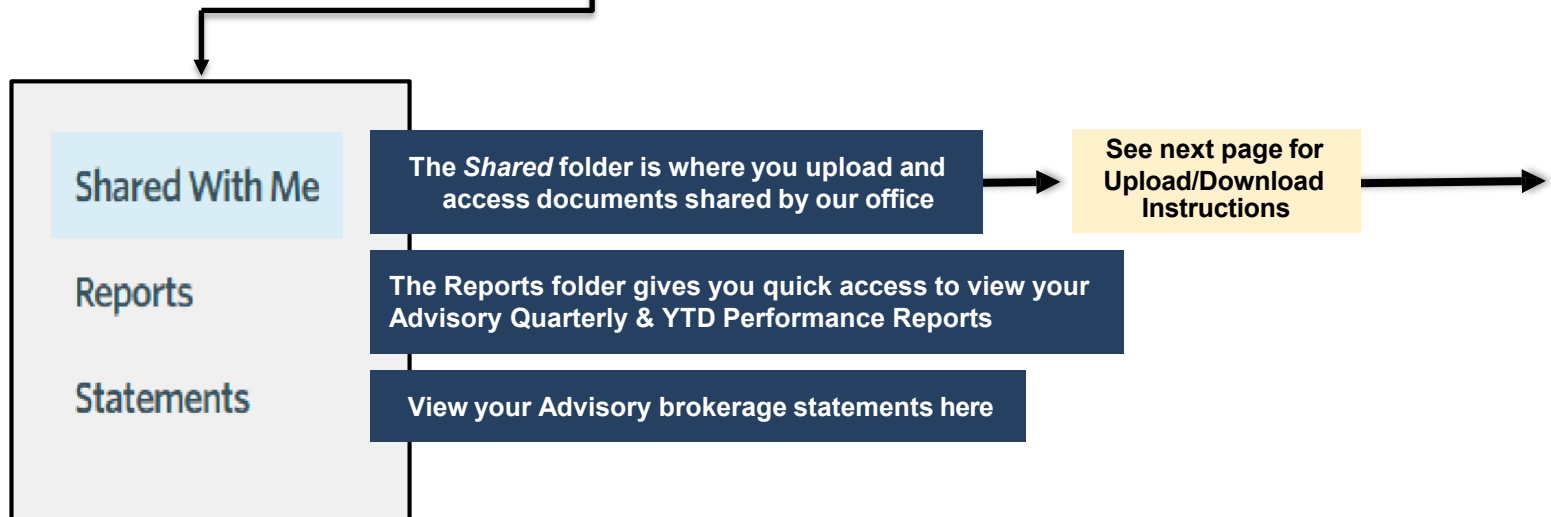
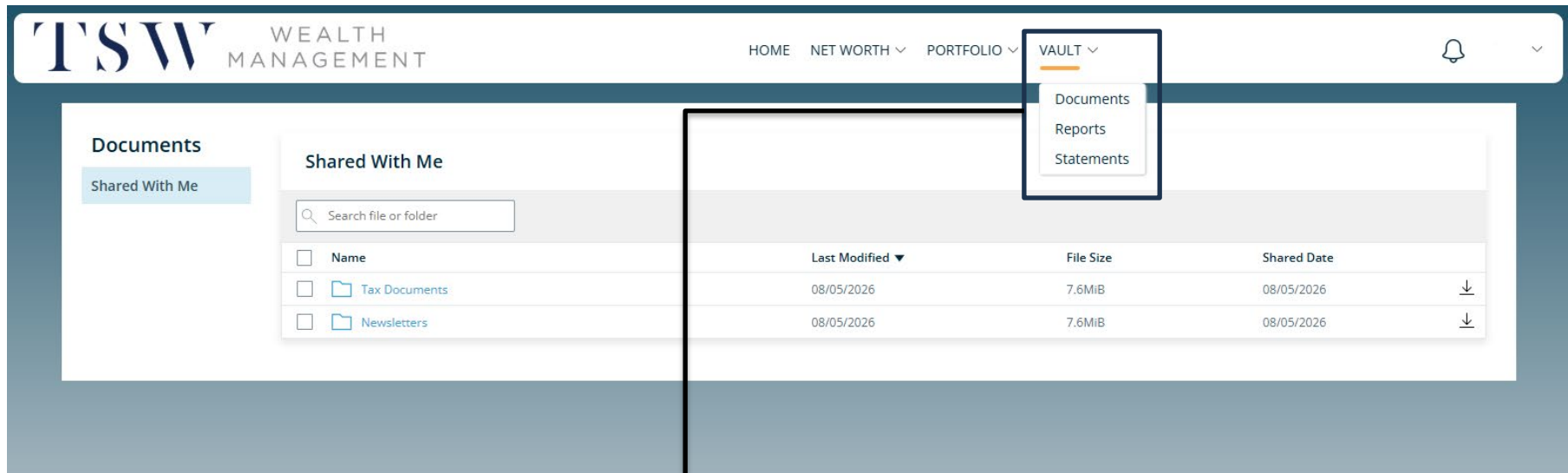
Settings

Filter Export

Date	Account No.	Account Name	Type	Asset Name	Symbol	Units	Price	Amount	Fee
07/31/2026	--	Bill and Savannah Bucks Advisory J...	Buy	LORD ABBETT CORE PLUS BOND I	LAPIX	208	13	2,600	0
07/31/2026	--	Bill and Savannah Bucks Advisory J...	Sale	GLOBAL X DEFENSE TECH ETF	SHLD	2	63	-126	0
07/31/2026	--	Bill and Savannah Bucks Advisory J...	Sale	BLACKROCK TACTICAL OPPORTUNITIES INSTL	PBAIX	4	17	-70	0
07/31/2026	--	Bill and Savannah Bucks Advisory J...	Sale	VANGUARD INTERMEDIATE-TERM TREASURY ETF	VGIT	2	58	-117	0
07/31/2026	--	Bill and Savannah Bucks Advisory J...	Sale	VANGUARD TOTAL BOND MARKET ETF	BND	1	72	-72	0
07/31/2026	--	Bill and Savannah Bucks Advisory J...	Sale	ISHARES 20+ YEAR TREASURY BOND ETF	TLT	25	82	-2,052	0
07/31/2026	--	Bill and Savannah Bucks Advisory J...	Sale	ISHARES CORE MSCI EMERGING MARKETS ETF	IEMG	1	78	-78	0

Welcome to the Vault

Secure file storage and document access



Vault Document Sharing

Upload/Download files between you and our office

The screenshot shows the TSW Wealth Management Vault interface. The top navigation bar includes 'HOME', 'NET WORTH', 'PORTFOLIO', and 'VAULT' (which is highlighted). A bell icon and a dropdown arrow are on the right. The main content area is titled 'Documents' and shows a breadcrumb path 'Shared With Me > My Documents'. A sidebar on the left has a 'Shared With Me' link. A dark blue callout box points to this link with the text: 'Click into *My Documents* to view/download documents shared by our office'. The main area contains a search bar, a 'Show All' dropdown, and a toolbar with icons for 'Mark Read/Unread', 'Rename', 'Share', 'Delete', and 'Download'. A dark blue callout box points to the toolbar with the text: 'Quickly edit, move, or download your files'. Below the toolbar is a table with columns: 'Name', 'Last Modified', 'File Size', and 'Shared Date'. The table lists two documents: 'Q1 2025 Newsletter' and 'Q2 2025 Newsletter'. The 'Q2 2025 Newsletter' is selected with a checkbox. A dark blue callout box points to the document name with the text: 'Click on the document name to download the file'. Below this, another dark blue callout box states: 'Once downloaded, you can view and print the document'. To the right of the table are buttons for 'New Folder' and 'Upload File'. A dark blue callout box points to the 'Upload File' button with the text: 'Upload documents to our office by clicking *Upload File* or simply drag and drop your files into the document space'. At the bottom of the main area is a 'Drag files here to upload' instruction.

Documents

Shared With Me

Shared With Me > My Documents

Search file or folder Show All

Mark Read/Unread Rename Share Delete Download

1 Item selected Clear

☐	Name	Last Modified	File Size	Shared Date
☐	Q1 2025 Newsletter	08/05/2026	4.8MiB	08/05/2026
☒	Q2 2025 Newsletter	08/05/2026	4.8MiB	08/05/2026

Drag files here to upload

New Folder Upload File

Click into *My Documents* to view/download documents shared by our office

Quickly edit, move, or download your files

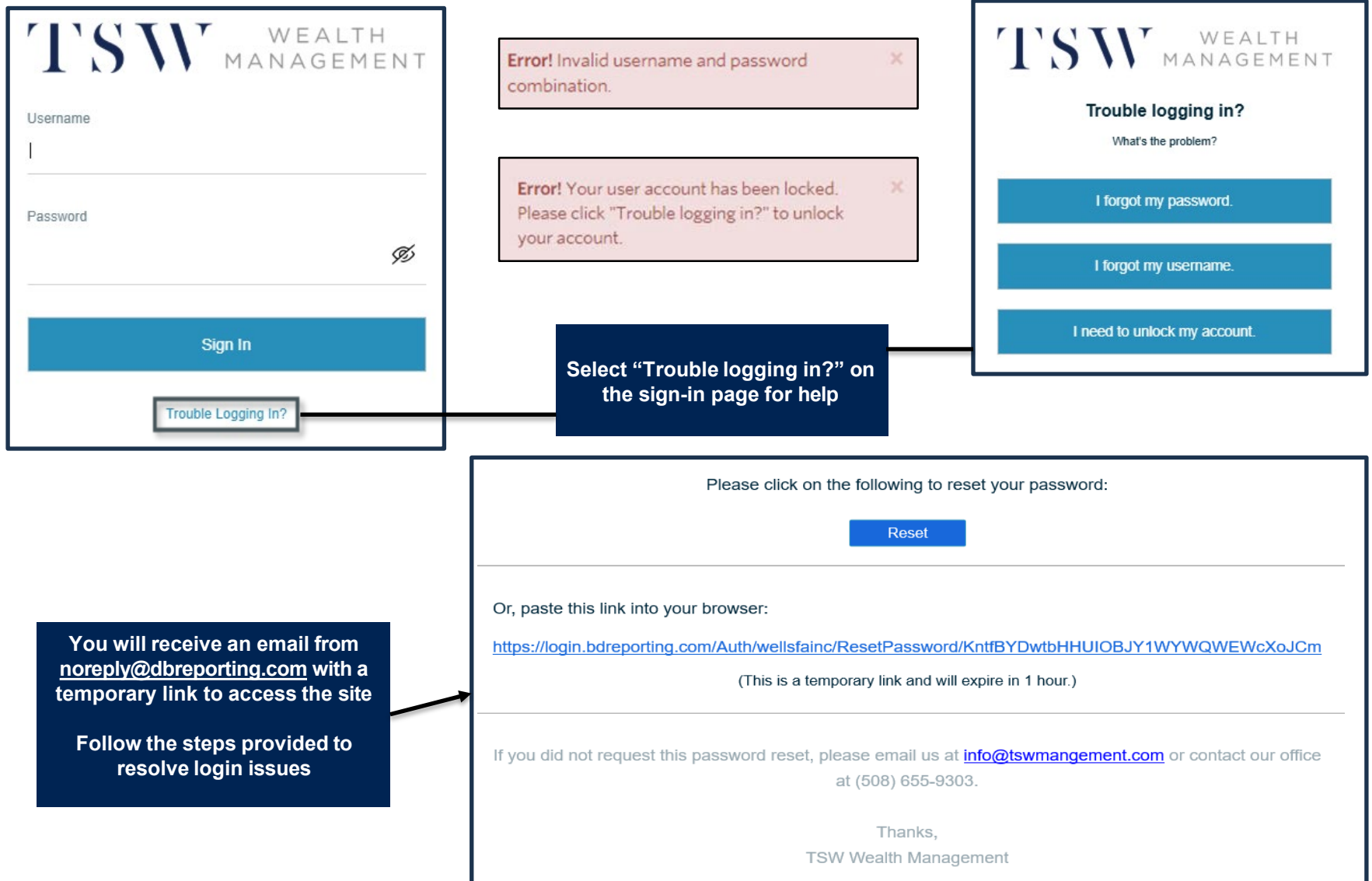
Click on the document name to download the file

Once downloaded, you can view and print the document

Upload documents to our office by clicking *Upload File* or simply drag and drop your files into the document space

Login Problems

How to access your account if you have trouble signing in to the site





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

TSW WEALTH
MANAGEMENT



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

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