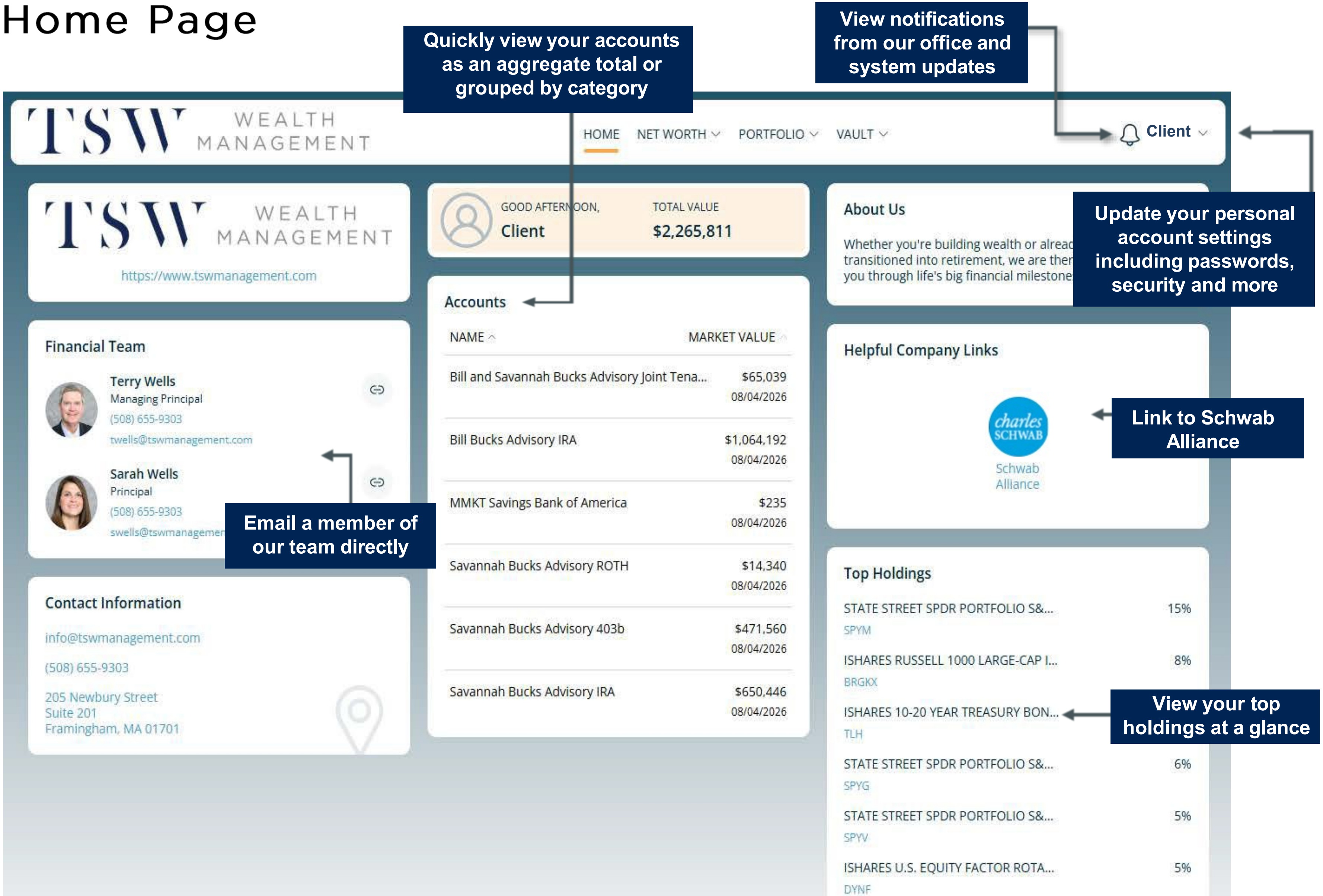
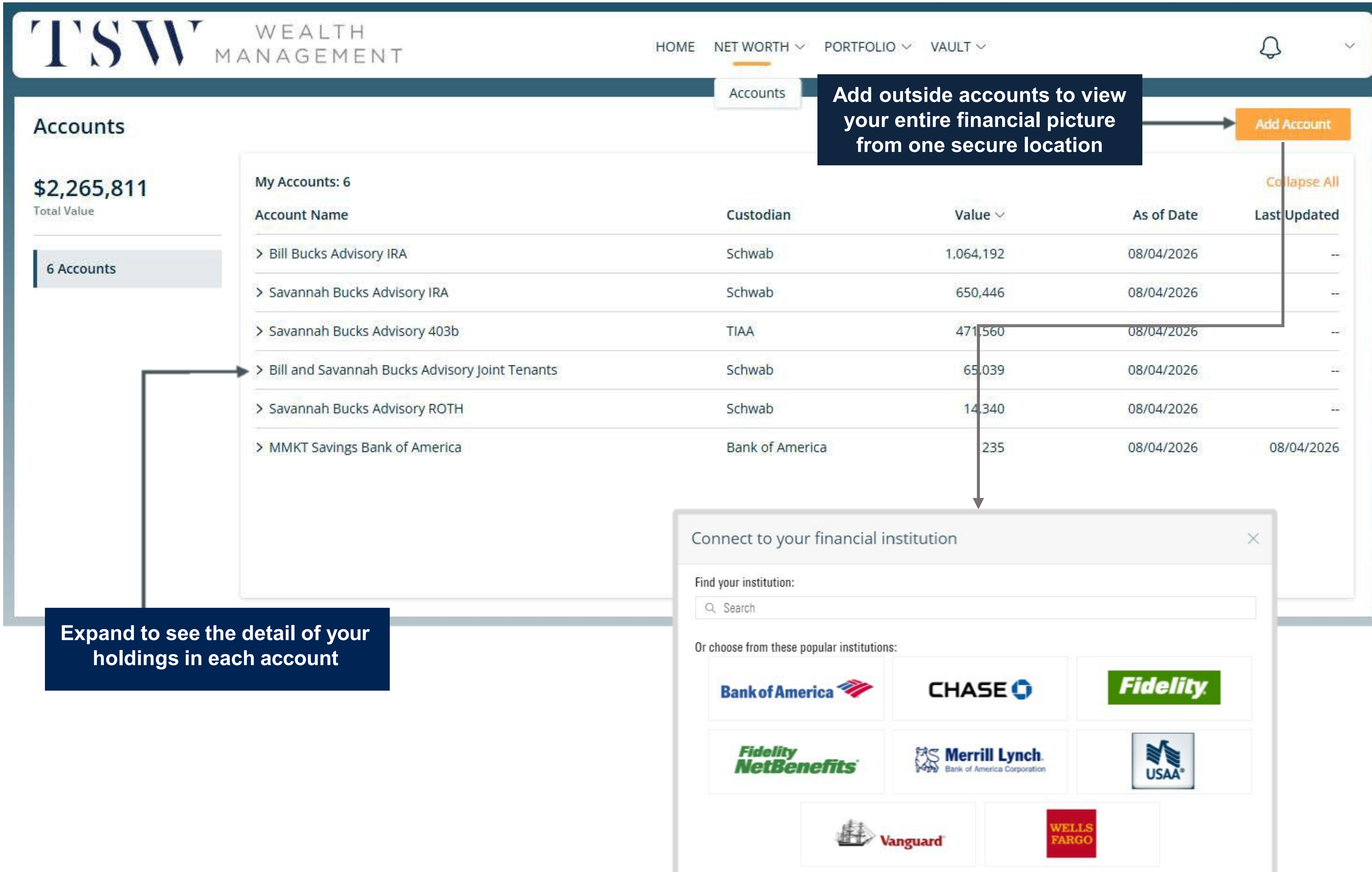
TSW WEALTH MANAGEMENT

Welcome to your Client Portal

Home Page


Quickly view your accounts as an aggregate total or grouped by category
View notifications from our office and system updates
TSW WEALTH MANAGEMENT
HOME
NET WORTH
PORTFOLIO
VAULT
Client
Update your personal account settings including passwords, security and more
https://www.tswmanagement.com
GOOD AFTERNOON,
Client
TOTAL VALUE
$2,265,811
About Us
Whether you're building wealth or alread
transitioned into retirement, we are ther
you through life's big financial milestone
Financial Team
Terry Wells
Managing Principal
(508) 655-9303
twells@tswmanagement.com
Sarah Wells
Principal
(508) 655-9303
swells@tswmanagemen
Email a member of our team directly
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
Helpful Company Links
charles SCHWAB
Schwab Alliance
Link to Schwab Alliance
Contact Information
info@tswmanagement.com
(508) 655-9303
205 Newbury Street
Suite 201
Framingham, MA 01701
Top Holdings
STATE STREET SPDR PORTFOLIO S&... 15%
SPYM
ISHARES RUSSELL 1000 LARGE-CAP I... 8%
BRGKX
ISHARES 10-20 YEAR TREASURY BON...
TLH
View your top holdings at a glance
STATE STREET SPDR PORTFOLIO S&... 6%
SPYG
STATE STREET SPDR PORTFOLIO S&... 5%
SPYV
ISHARES U.S. EQUITY FACTOR ROTA... 5%
DYNF

Net Worth



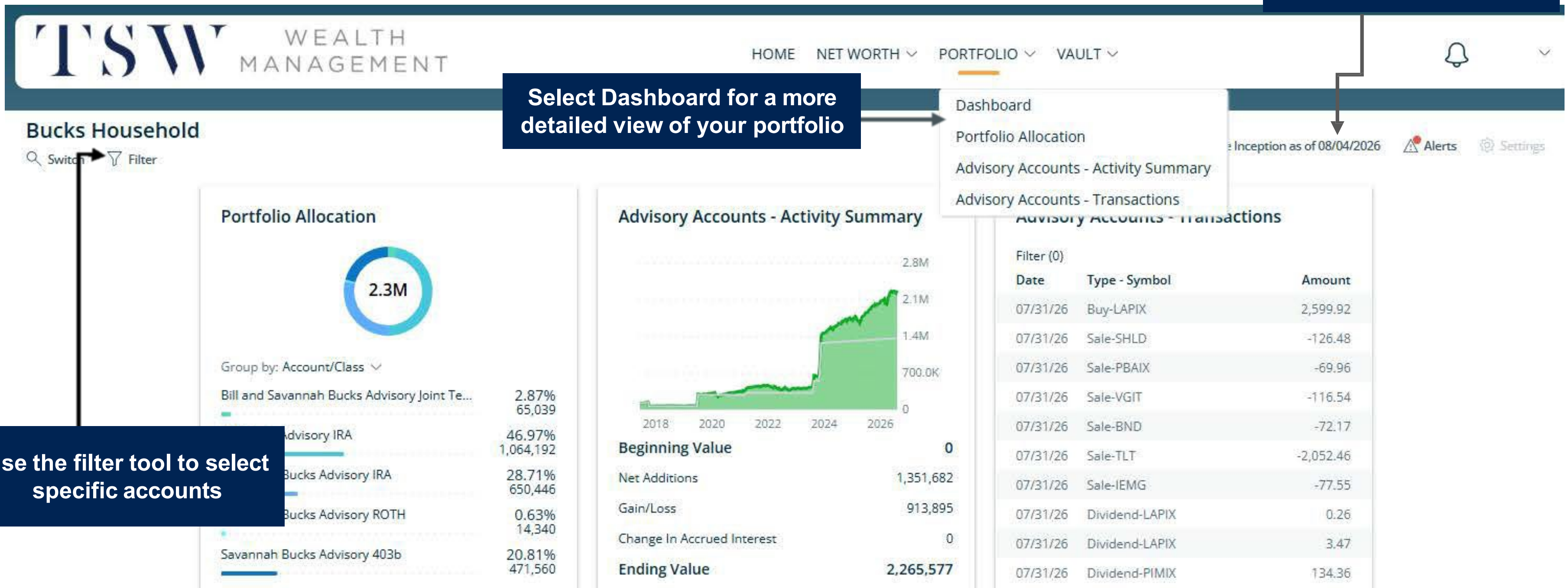
Add outside accounts to view your entire financial picture from one secure location

Expand to see the detail of your holdings in each account

Portfolio

Change the date range by clicking on the date

Select Dashboard for a more detailed view of your portfolio

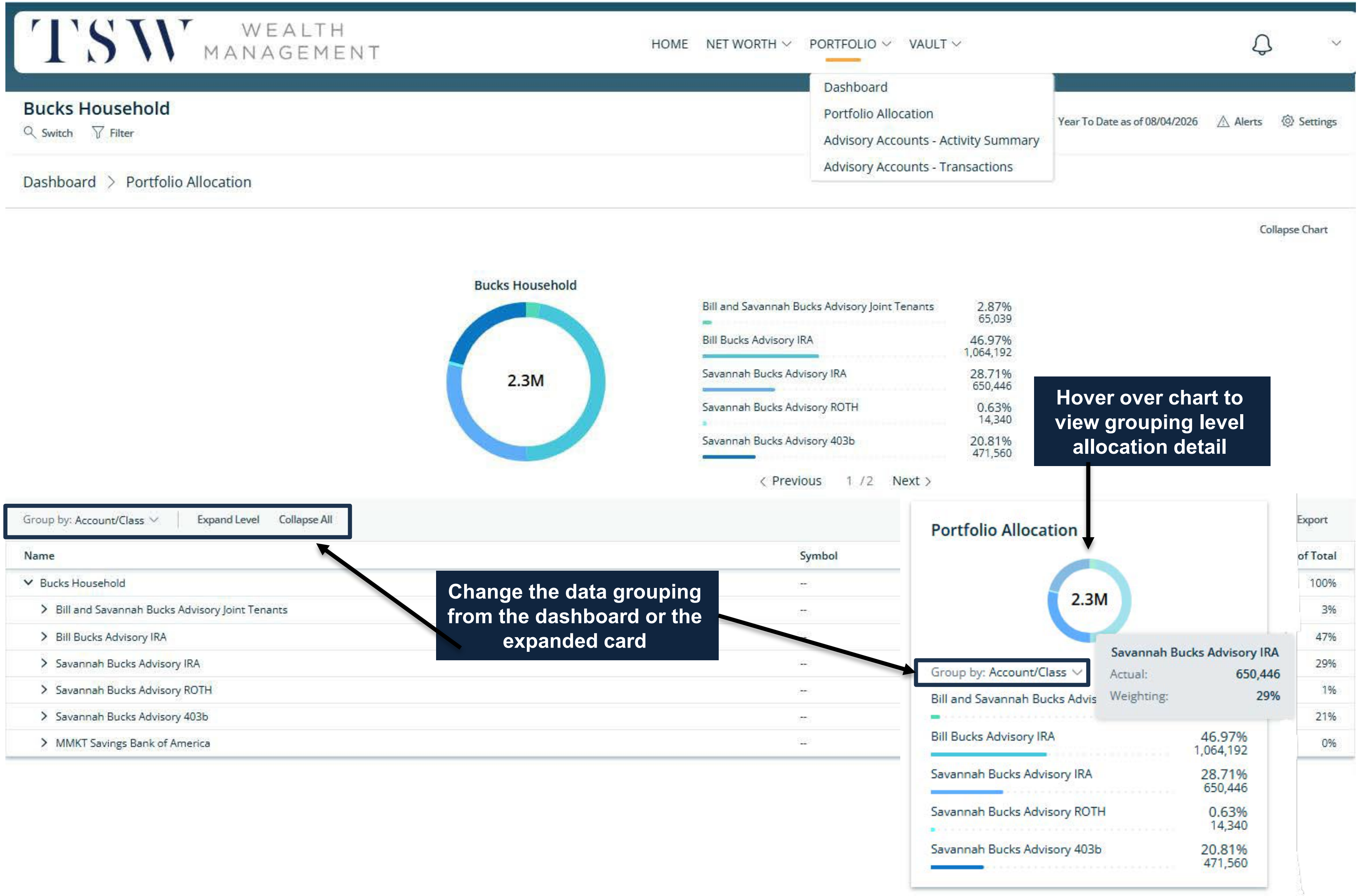


Use the filter tool to select specific accounts

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

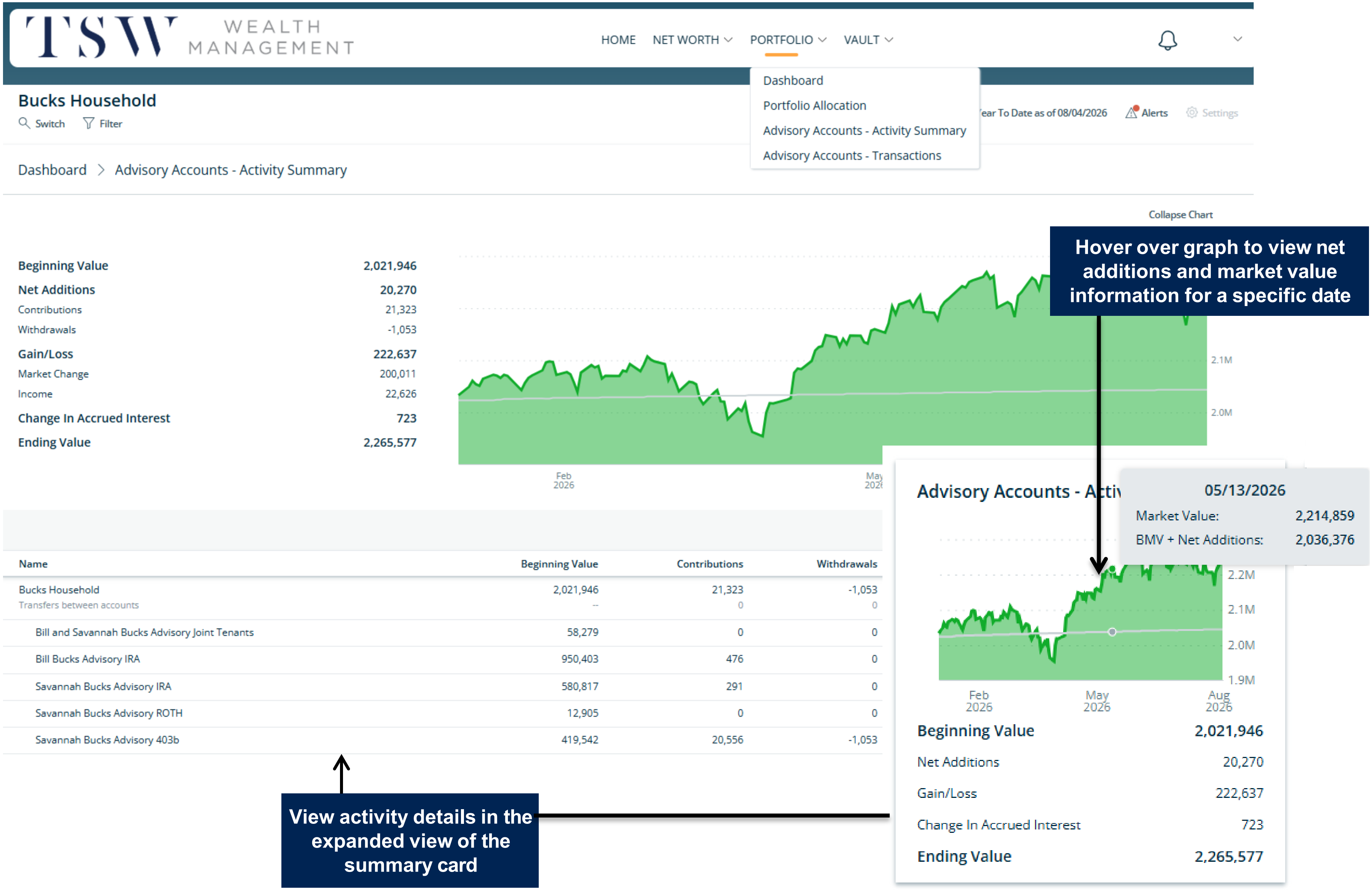
Portfolio Allocation

View the allocation breakdown of your entire portfolio and individual accounts



Advisory Accounts - Activity Summary

View activity details and changes in your portfolio



Advisory Accounts - Transactions

View and filter the most recent transactions in your portfolio

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

Filter by account for an easier view

TSW WEALTH MANAGEMENT

HOME NET WORTH PORTFOLIO VAULT

- Dashboard
- Portfolio Allocation
- Advisory Accounts - Activity Summary
- Advisory Accounts - Transactions

Bucks Household

Switch Filter

te as of 08/04/2026 Alerts Settings

Sort column headers to organize your transactions

Dashboard > Advisory Accounts - Transactions

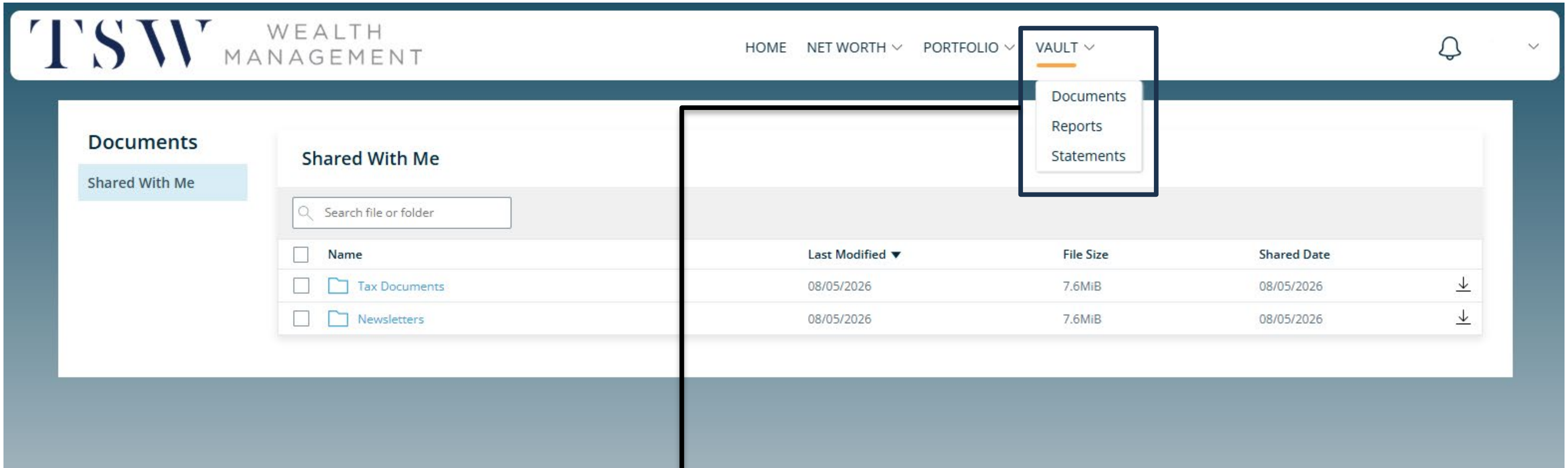
Export data to an Excel Spreadsheet

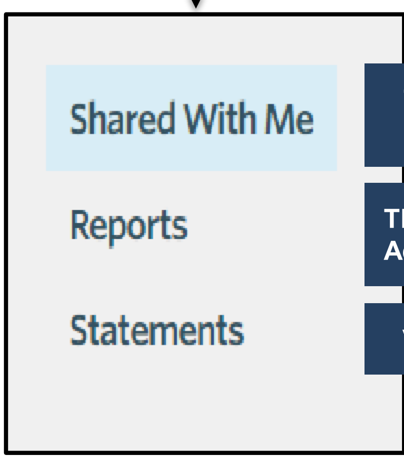
Filter Export

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





The *Shared* folder is where you upload and access documents shared by our office

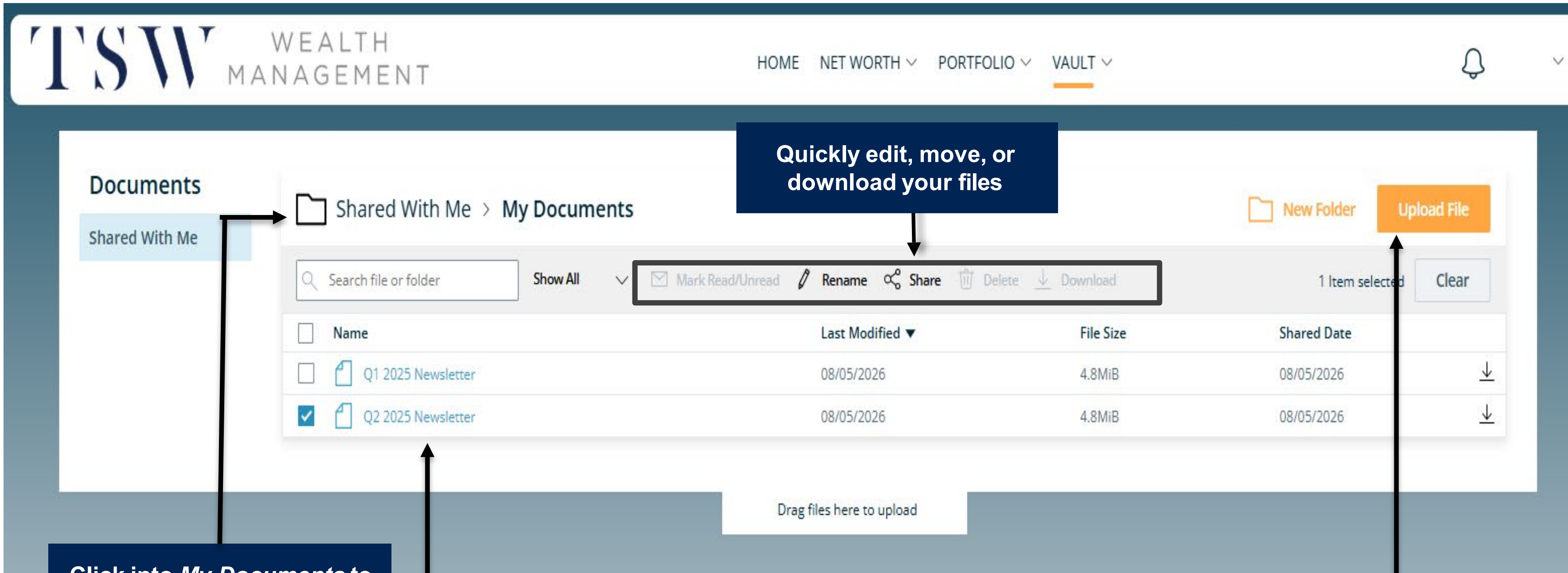
See next page for Upload/Download Instructions

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

View your Advisory brokerage statements here

Vault Document Sharing

Upload/Download files between you and our office



Quickly edit, move, or download your files

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

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

Click on the document name to download the file

Once downloaded, you can view and print the document

Login Problems

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

TSW WEALTH MANAGEMENT

Username

Password

Sign In

Trouble Logging In?

Error! Invalid username and password combination.

Error! Your user account has been locked. Please click "Trouble logging in?" to unlock your account.

Select "Trouble logging in?" on the sign-in page for help

TSW WEALTH MANAGEMENT

Trouble logging in?

What's the problem?

I forgot my password.

I forgot my username.

I need to unlock my account.

You will receive an email from noreply@dbreporting.com with a temporary link to access the site

Follow the steps provided to resolve login issues

Please click on the following to reset your password:

Reset

Or, paste this link into your browser:

https://login.bdreporting.com/Auth/wellsfainc/ResetPassword/KntfBYDwtbHHUIOBJY1WYWQWEWcXoJCm

(This is a temporary link and will expire in 1 hour.)

If you did not request this password reset, please email us at info@tswmangement.com or contact our office at (508) 655-9303.

Thanks,
TSW Wealth Management

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.

TSW Wealth Management
508-655-9303
info@tswmanagement.com