Welcome to our New Client Portal
My Accounts

$32,879,951.64
Total Value

My Accounts

My Accounts: 6
Accounts that are in process are excluded from your Account Total Value. Added Accounts may take 24-48 hours to appear in your portfolio.

Account Number | Account Name | Custodian | Value | As Of Date | Last Updated
----------------|--------------|-----------|-------|------------|--------------
> XXXXXXXX6726  | test account | Test Data | 726.34| --         | 04/24/2018   
> XXXXXXXX0909  | test account | Test Data | 6,070.85| --         | 04/24/2018   
> XXXXXXXX4724  | test account | Test Data | 7,400.72| --         | 04/24/2018   
> XXXXXXXX3391  | test account | Test Data | 5,123.36| --         | 05/01/2018   
> XXXXXXXX6523  | test account | Test Data | 1,024.86| --         | 05/01/2018   
> XXXXXXXX4243  | test account | Test Data | 7,573.62| --         | 05/01/2018   

Expand each account to see your holdings detail.

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

Add Account

Choose an Institution

Filter institutions using the input below or choose from the list provided:

- BANK OF AMERICA
- E*TRADE
- Fidelity NetBenefits
- TD Ameritrade
- Schwab
- Vanguard
MISS THE OLD VIEW?
Select DASHBOARD for an overview of all cards

Use the filter tool to select specific accounts

Click on the title of any card to expand to a full screen view
Total Assets/Net Worth

View information specific to your Assets and Liabilities

- Change the date range to update the timeframe on the chart
- Hover over chart to view daily status
- View a summary of all your accounts organized by Assets and Liabilities

Oct 07 2013

- Assets: 32,879,952
- Liabilities: 0.00
- Net Worth: 32,879,952
Allocation

View the allocation breakdown of your entire portfolio and individual accounts.
Activity Summary – Advisory Accounts

View activity details and changes in your portfolio

Hover over graph to view net additions and market value information for a specific date

View additional details in the expanded view of the summary card
Transactions – Advisory Accounts

View and filter the most recent transactions in your portfolio

We recommend filtering by account for an easier view

Sort column headers to organize your transactions

Export data to an Excel Spreadsheet

Click on the Settings icon to filter by transaction type

Transaction Type Filter
Select filters to apply to data table (not applicable to the Dashboard Summary).
Select AS - Deselect AS
- Buys
- Sells
- Capital Gains
- Income
- Management Fees
- Expenses
- Alternatives
- Contributions
- Withdrawals

<table>
<thead>
<tr>
<th>Date</th>
<th>Account Number</th>
<th>Account Name</th>
<th>Action</th>
<th>Type</th>
<th>Asset Name</th>
<th>Symbol</th>
<th>Units</th>
<th>Price</th>
<th>Amount</th>
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<tbody>
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<td>XXXXX2303</td>
<td>Williams Trust - PIMCO</td>
<td>Buy</td>
<td>Buy</td>
<td>FEDERAL HOME LN BK CONS DISC NOTES 0.000% 01/02/14 B/EDTD 01/02/13</td>
<td>313385RQG3</td>
<td>200,000</td>
<td>100</td>
<td>199,988</td>
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<td>Sale</td>
<td>FEDERAL HOME LN BK CONS DISC NOTES 0.000% 01/02/14 B/EDTD 01/02/13</td>
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<td>-199,988</td>
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<tr>
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<td>XXXXX6082</td>
<td>Tina Hickson</td>
<td>Buy</td>
<td>Buy</td>
<td>ISHARES INC MSCI MEXICO</td>
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<td>36</td>
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<td>Sale</td>
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</table>
Vault

File storage and document access

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

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

View your Advisory brokerage statements here.
Vault Document Sharing

Upload/Download files between you and our office

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

Upload documents to our office by clicking New 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

You will receive an email with a link to access the site.

Follow the steps provided to resolve login issues.

Select “Trouble logging in?” on the sign-in page for help.

Please use the link below to reset your password:

https://bd3.bdreporting.com/Auth/Default/ResetPassword/CtEU7X0g70StVRVa1XJGdA

This is a temporary link and will expire in 2 days.

If you did not request this password reset, please contact your administrator.

Thanks,
Black Diamond

--- This is an auto generated email. Please do not reply. ---
Your personalized portal keeps you connected to your financial life, your advisory team, and everything else you need for managing your personal wealth.
If you have any questions, please contact us. We are always here for you.

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