Investor360°®

VIEW YOUR ENTIRE FINANCIAL LIFE ONLINE, ALL IN ONE PLACE

INVESTOR360º® GIVES YOU THE POWER TO SEE AN EXECUTIVE SUMMARY OF YOUR FINANCIAL LIFE, WHENEVER YOU WANT, FROM ANY INTERNET CONNECTION.

SEE EVERYTHING IN A SINGLE PLACE WITH ONE EASY-TO-USE CONNECTION

Investor360° lets you view much of the same information we do when managing your accounts. You can:

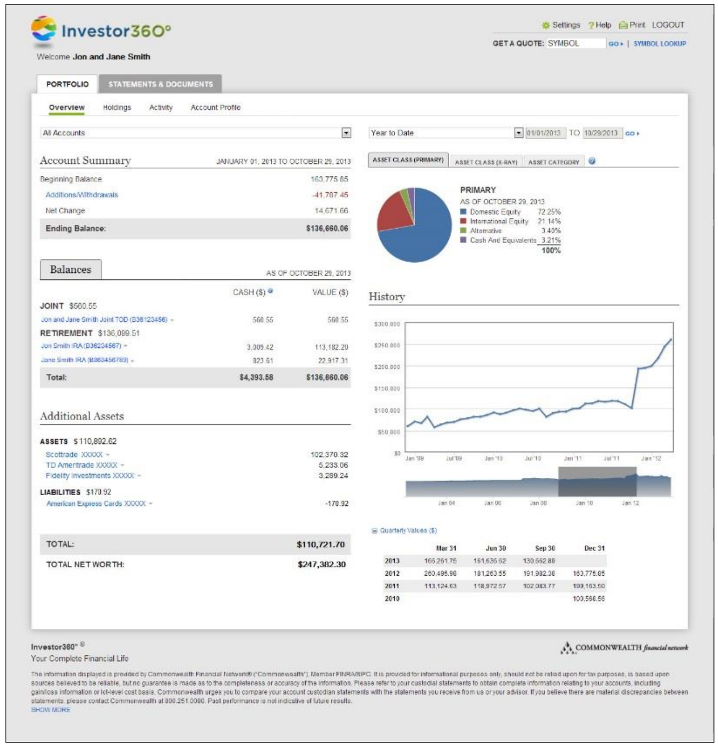
- **See your account balances** and a detailed position breakdown for each account as of any date range, including accounts not held with us.
- View balances and positions, as well as performance, for all your accounts held with us.
- **Check on recent transactions** within your accounts.
- **Link to other accounts**, such as your spouse's or children's, held with us. (Restrictions may apply; contact us for details.)
- **Review important facts**, such as your account setup and contact information, listed beneficiaries, and other named individuals.
- View important paperwork our office has shared with you in a **secure document vault**.
- **Eliminate paper statements** and view or download current and historical account statements and trade confirms online.
- **Get real-time price quotes** and charts for traded securities.
- **Run in-depth reports** to get even more information on your accounts.
- **Import account information to TurboTax** for easier, more efficient tax filing.

EASY TO USE, EASY TO UNDERSTAND

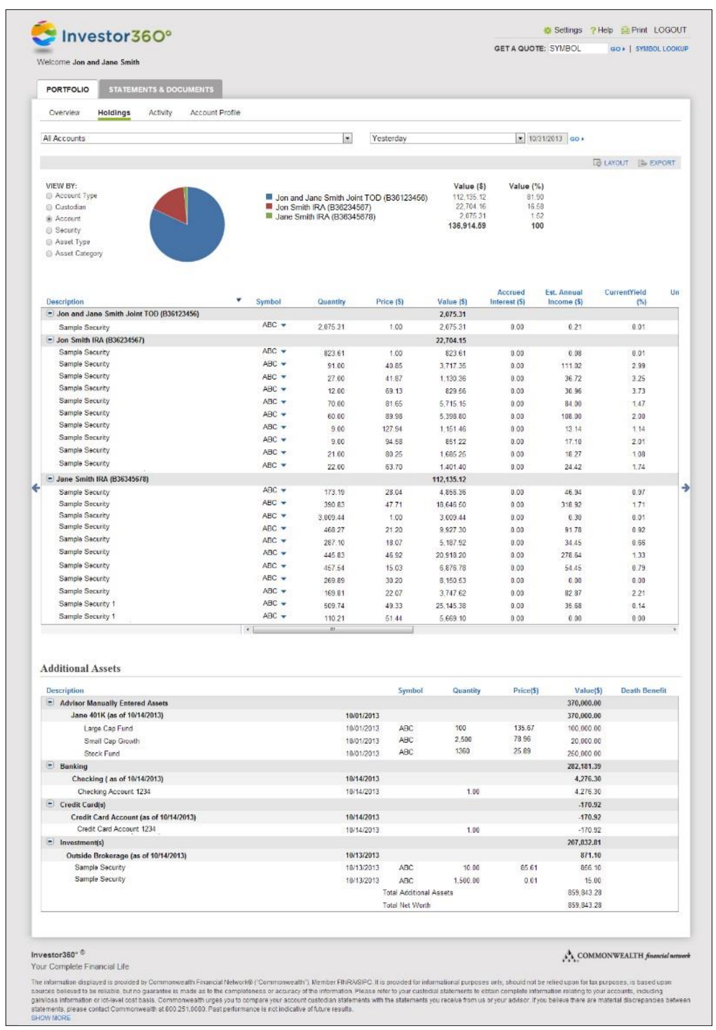
Investor360° works with today's most popular Internet browsers, including Internet Explorer, Firefox, Safari (for Macintosh), and Chrome. Just log on and point and click to manage, monitor, and navigate within your accounts however you like.

Also, our mobile app makes it easier for you to view your account information on the go. You can download the app directly from the Apple App Store (for Apple devices) or Google Play (for Android devices). Just search for "Investor360" and follow the prompts to add the app to your smartphone or tablet.

Overview displays your accounts and their current values, as well as asset allocation, performance, and benchmark information, and provides charts of your current net worth and historical values.

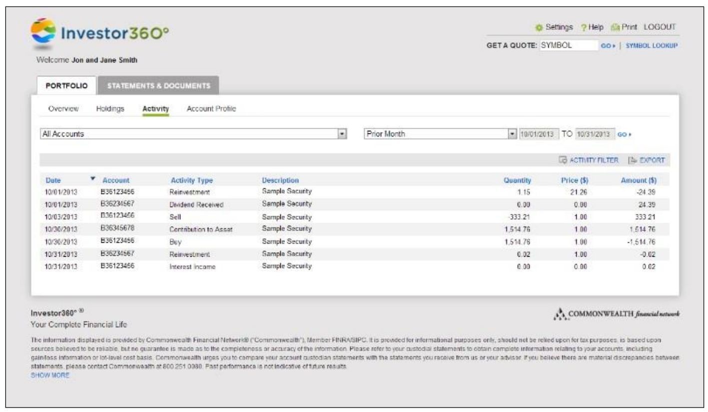


Holdings shows you all your holdings (even those held elsewhere) at various levels (i.e., by asset and by asset category) with the option to group them either by account or by securities held across all accounts. It also allows you to export data directly to Excel. Choose from up to 20 columns of data that are most important to you.



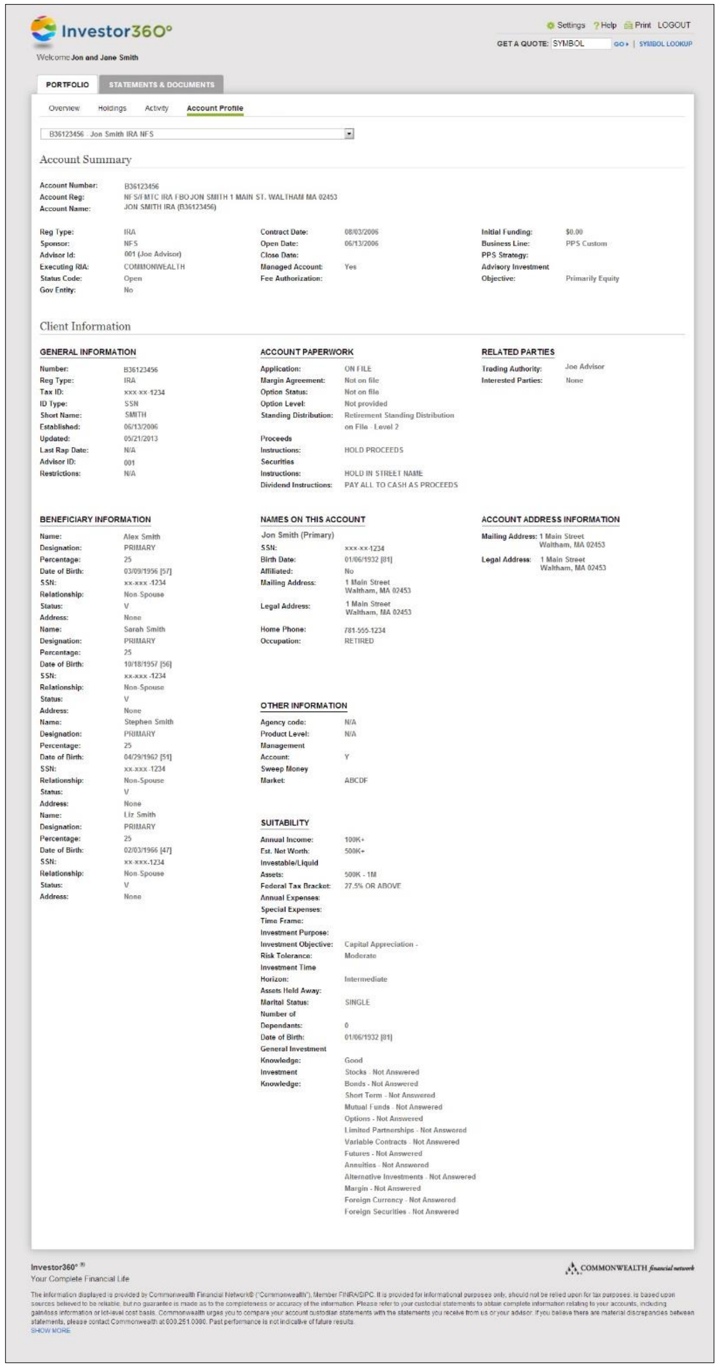
Additional Assets lets you add account information from outside sources and view it all through Investor360°.

Activity details all your account activity, such as buys and sells, dividends, and adjustments, and allows you to view realized gain/loss information. Smart filters make it easy to drill down into an activity to find what you are looking for.



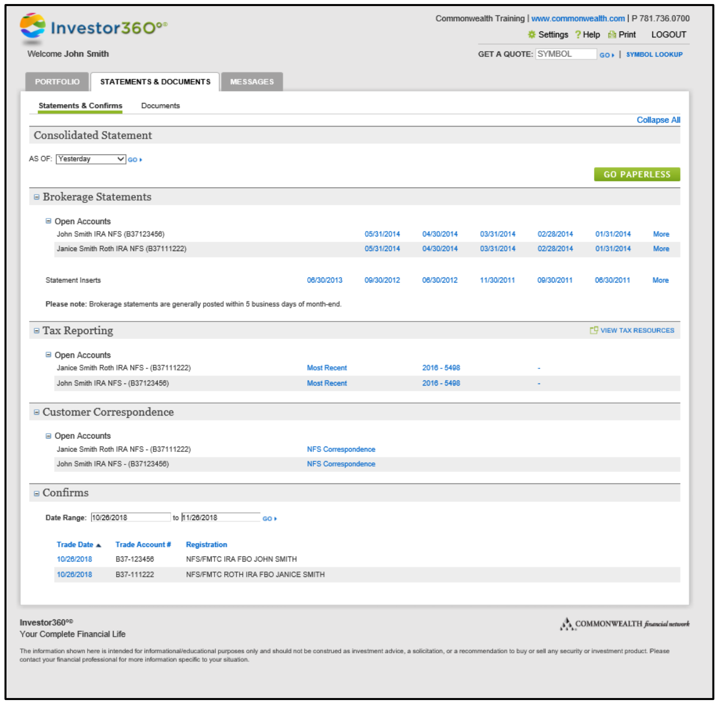
Account Profile lists the addresses on file for your account, holding instructions, and any listed beneficiaries.

Reports provides you with access to many of the same reports we use, so you can take a more in-depth look at your accounts.



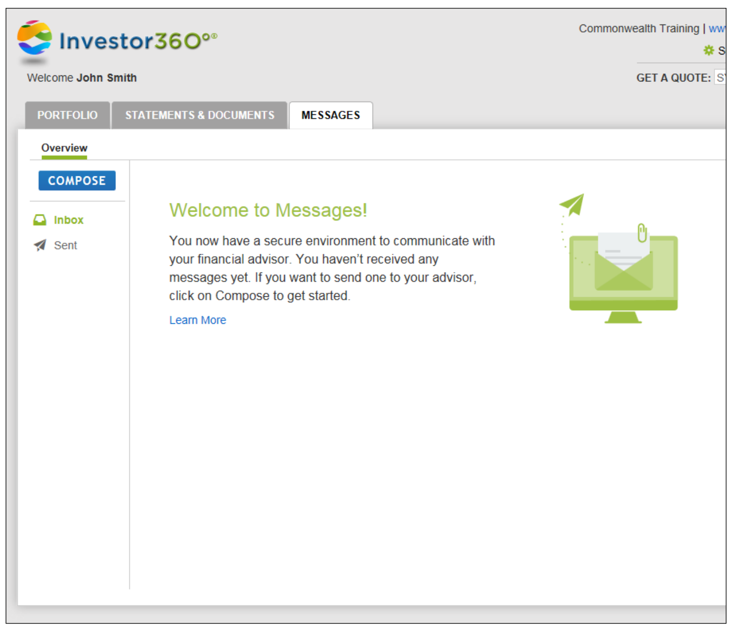
Statements & Confirms lets you download consolidated statements, brokerage statements, and trade confirms for your accounts with one click.

Documents allows you to view materials we've shared with you.

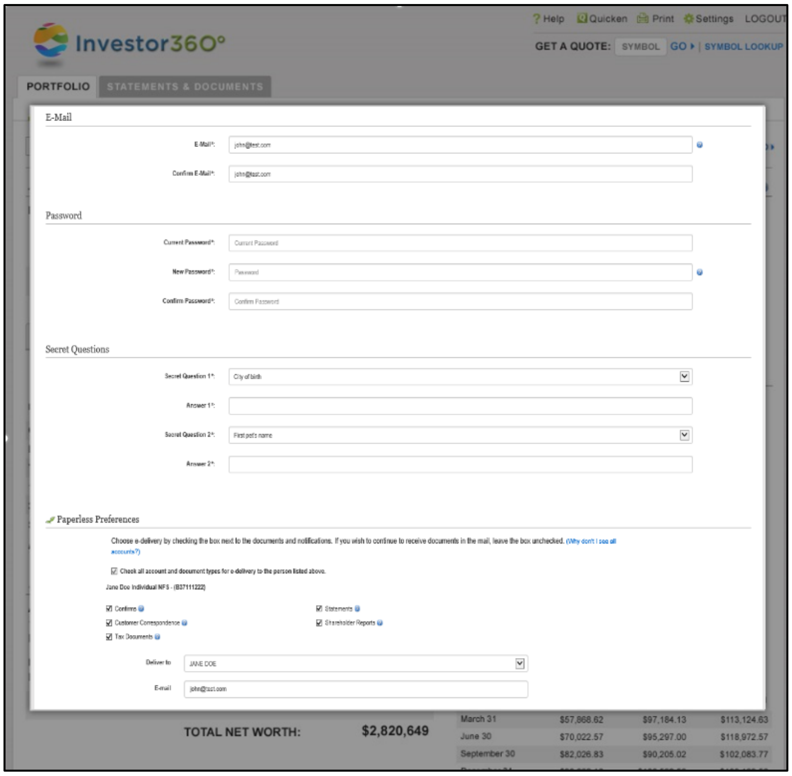


Investor360°® Messages

Is designed to provide you with an easy and tightly integrated way to send and receive messages and/or documents securely.



Settings lets you update your password, name, e-mail address, paperless preferences, and security information.



ENHANCED PRIVACY HELPS BRING PEACE OF MIND

Investor360° uses security protocols in an effort to ensure that your account information stays between you and our firm. You update your own password; if you forget your login information, Investor360° will provide unique security questions to allow you, and only you, to regain access to your accounts. For added security, your complete social security number is not displayed within Investor360°.

SIGN UP NOW TO SEE YOUR PORTFOLIO ONLINE

Call us and we'll get you set up over the phone. You can start viewing your accounts today. That's all it takes to start seeing your complete financial picture from every angle, whenever and wherever it's convenient for you.