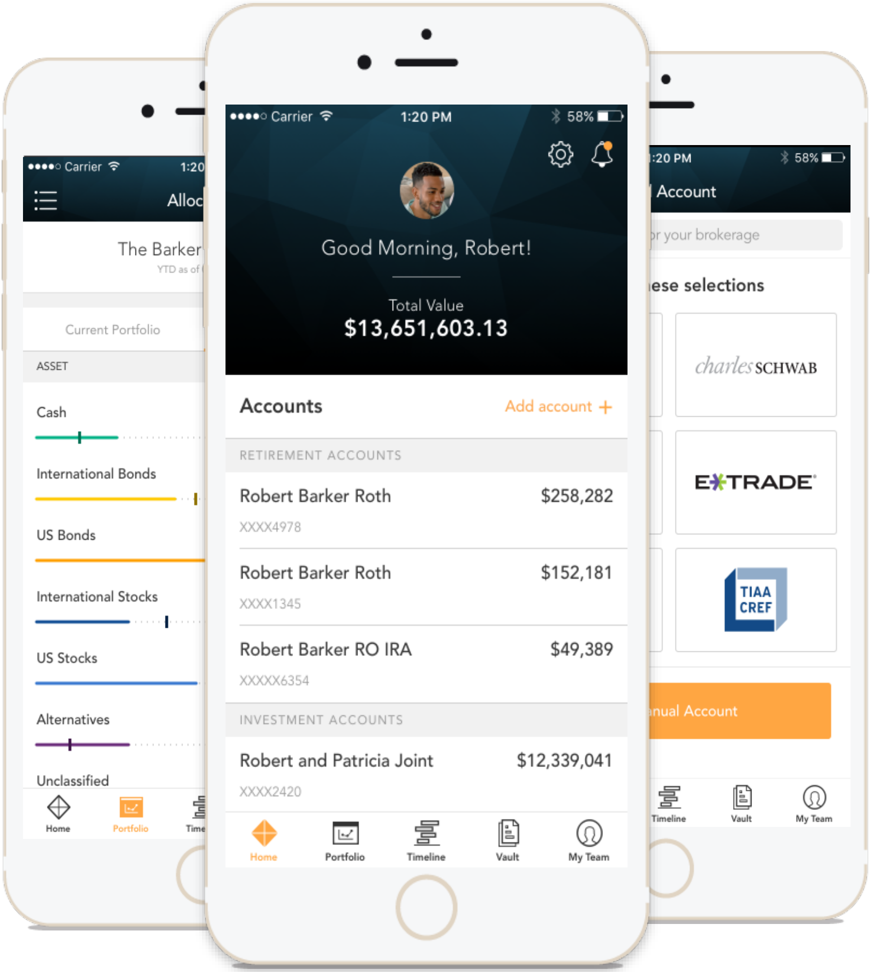
WELCOME TO YOUR PERSONAL FINANCIAL PORTAL

REBY ADVISORS
WEALTH REDEFINED

Personalized For You

From your portal, you have access to unique information and insights, account details, your investment dashboard, a document vault, instant access from any of your devices, and more.



REBY ADVISORS
WEALTH REDEFINED

Stay Connected to Your Financial Picture

Home Page	At-a-glance view of pertinent account information
Portfolio	Dynamic view of your entire portfolio
Vault	Easily keep track of and share your important financial and legal documents
My Accounts	Detailed list of your accounts
Login Questions	Helpful hints

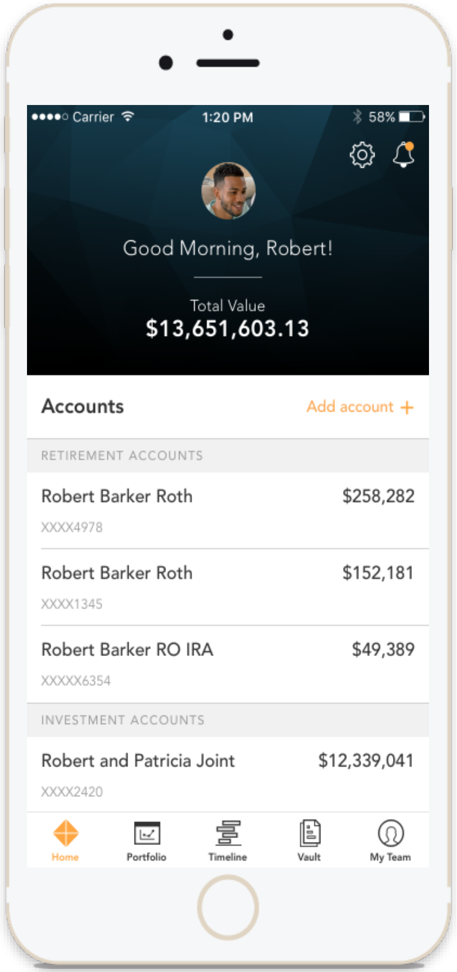
Home Page

When you log in, you'll see your personalized home page. Across the top, you have quick access to the other pages of your portal.

Your accounts and total portfolio value are listed front and center. Next to your accounts, you'll also find your top holdings for quick reference.

You can stay connected to your financial team with clickable links to phone numbers, emails, and office locations.

You can also quickly contact your Advisor while on the go. In addition to contacting us, we will send you communications and updates from your team—all directly within the portal.



Home Page

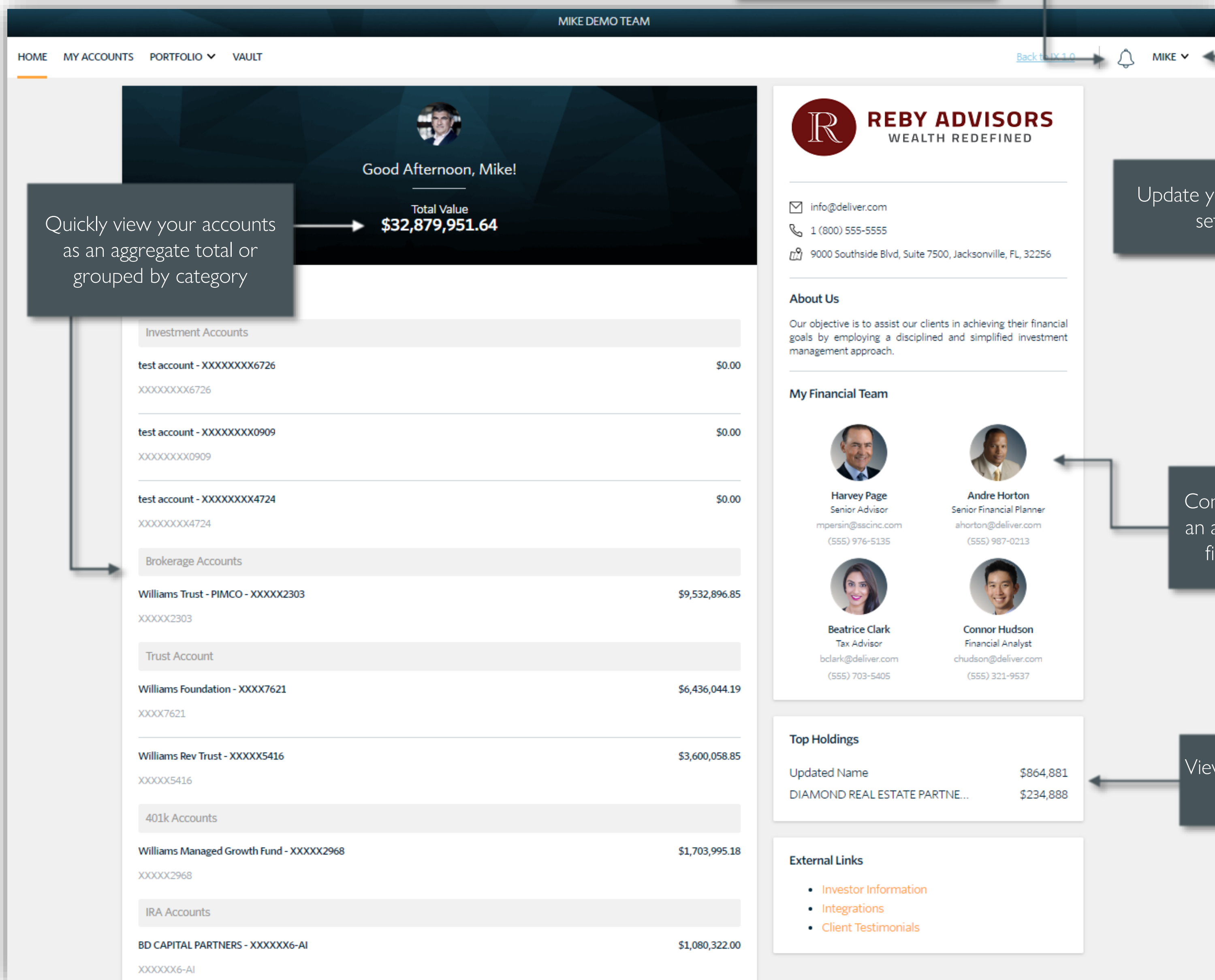
View notifications from your advisor

Update your account settings

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

Communicate or schedule an appointment with your financial team directly

View your top holdings at a glance

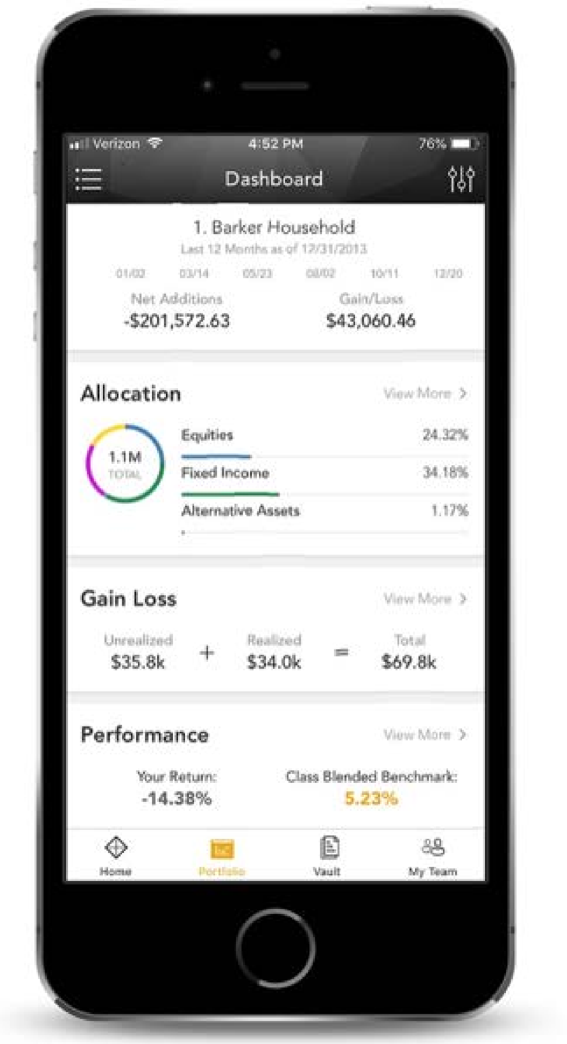


Portfolio

The Portfolio dashboard is where you can view additional details about your portfolio. The dashboard gives you a dynamic overview of your portfolio with performance cards highlighting key information of your portfolio.

To get even more detail, you can click on the title of each card. You can also use the drop-down menu to switch between the different cards quickly.

All of this is completely customizable using the filters to select specific date ranges, portfolios, or accounts.



Portfolio

Run Reports directly from your portal
MIKE DEMO TEAM
HOME
MY ACCOUNTS
PORTFOLIO
VAULT
Back to IX 1.0
MIKE
Williams Family
Filter
Change your portfolio or filter for specific accounts
Year To Date as of 12/31/2013
Update Supervised and Performance Return settings
Performance
9.0%
10.0%
7.5%
5.0%
2.5%
0.0%
Feb 2013
May 2013
Aug 2013
Nov 2013
dvizr
99%
Probability of Success
Target: 70 - 100%
Goals
Action Needed
Retirement 2
Insurance 1
Buy a car 2
Buy a Boat 2
Buy a second boat 2
Net Worth
Your Net Worth
32,879
Assets
32.9M
Brokerage Accounts
401k Accounts 5.2%
529 Accounts 31.7%
IRA Accounts 3.6%
Trust Account 30.5%
Transactions
Date | Type - Symbol | Amount
12/31/13 | Management Fee - CASH | -12,871
12/31/13 | Management Fee - CASH | -34,083
12/31/13 | Dividend - FTEXX | 3
12/31/13 | Management Fee - CASH | -37,311
12/31/13 | Income Reinvestment - SCHWAB... | 0
12/31/13 | Management Fee - CASH | -325
12/31/13 | Interest - FCASH | 0
12/31/13 | Capital Gains - DXJ | 237
12/31/13 | Capital Gains - DXJ | 99
12/31/13 | Dividend - DXJ | 201
Projected Income
140.0K
105.0K
70.0K
35.0K
0
Jan 2014
Mar 2014
May 2014
Jul 2014
Sep 2014
Nov 2014
Total Income 895,040
Dividend 419,721
Taxable 418,968
Tax-Exempt 753
Interest 475,319
Taxable 215,444
Tax-Exempt 259,875
Activity Summary
34.0M
33.0M
32.0M
31.0M
30.0M
29.0M
Feb 2013
May 2013
Aug 2013
Nov 2013
Beginning Value 26,243,713
Net Additions 3,870,901
Gain/Loss 2,765,338
Ending Value 32,879,952

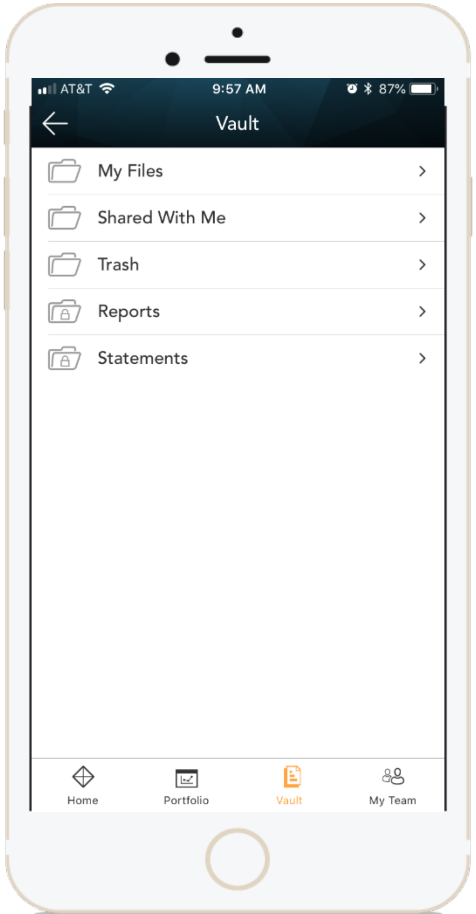
Vault

Securely sharing and managing documents is key to working with your wealth management team. The Vault page is where you can keep track of all your important financial and legal documents.

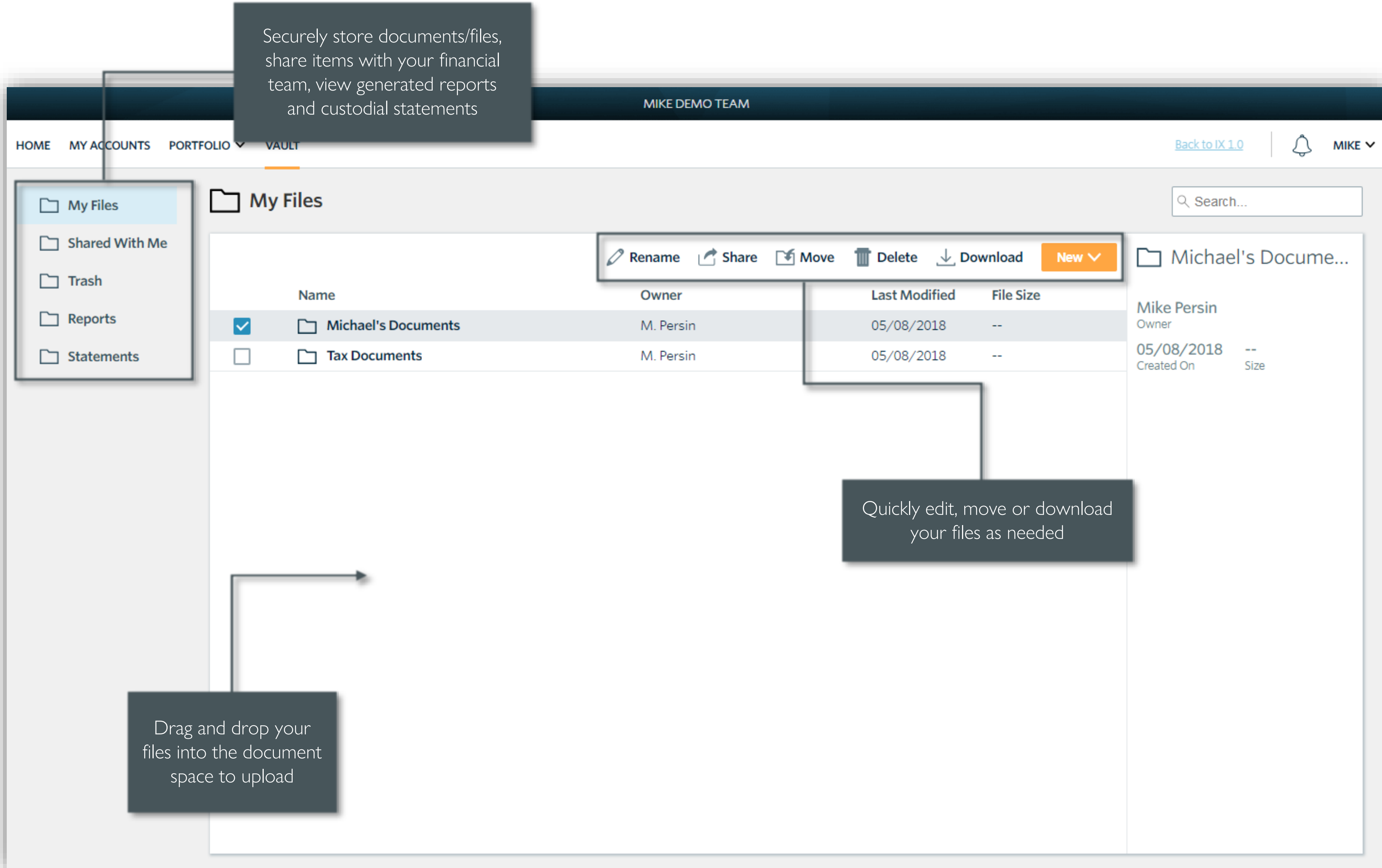
From here, you can organize your documents into folders, drag-and-drop to upload new documents, and easily move files from one folder to another.

The Vault is also an area where we can share documents with each other through the Shared Folders option.

From the Statements and Reports folders, you have quick access to view investment focused reports created by your financial team.



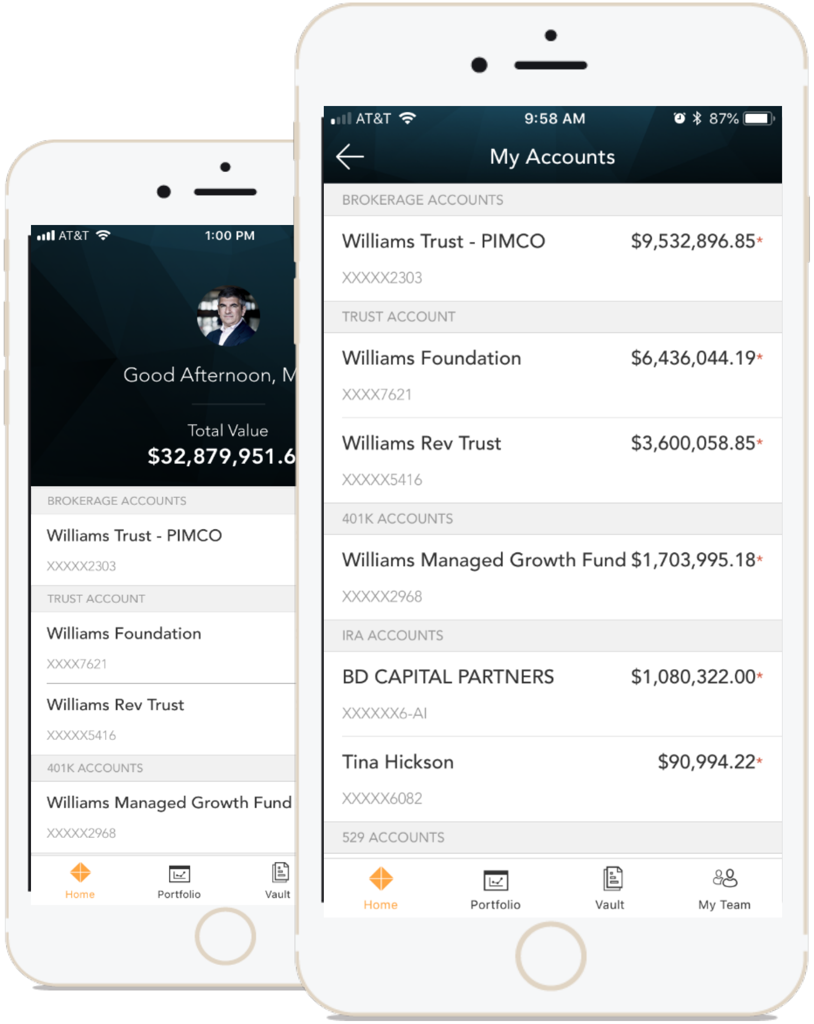
Vault


Securely store documents/files, share items with your financial team, view generated reports and custodial statements
MIKE DEMO TEAM
HOME
MY ACCOUNTS
PORTFOLIO
VAULT
Back to IX 1.0
MIKE
My Files
Shared With Me
Trash
Reports
Statements
My Files
Search...
Rename
Share
Move
Delete
Download
New
Michael's Docume...
Name
Owner
Last Modified
File Size
Michael's Documents
M. Persin
05/08/2018
--
Tax Documents
M. Persin
05/08/2018
--
Mike Persin
Owner
05/08/2018
Created On
--
Size
Quickly edit, move or download your files as needed
Drag and drop your files into the document space to upload

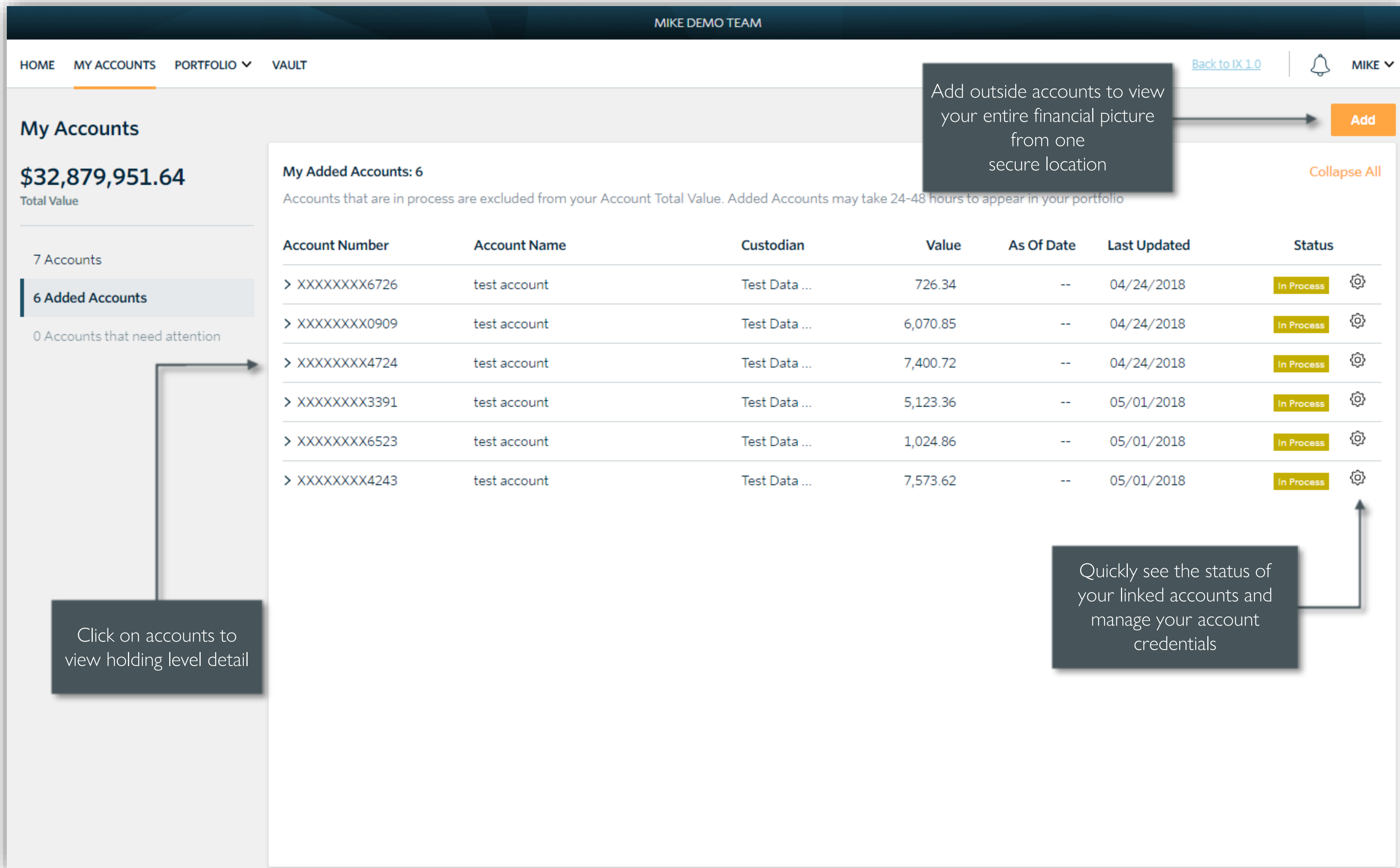
My Accounts

On the My Accounts page, you can see a detailed list of your accounts. Balances and statuses are viewable at a glance. You can expand each account to see your holdings and their individual values.

Keep track of their status and updates directly from your portal.



My Accounts



MIKE DEMO TEAM
HOME
MY ACCOUNTS
PORTFOLIO
VAULT
Back to IX 1.0
MIKE
Add outside accounts to view your entire financial picture from one secure location
Add
My Accounts
$32,879,951.64
Total Value
7 Accounts
6 Added Accounts
0 Accounts that need attention
My Added Accounts: 6
Collapse All
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
Status
XXXXXXXX6726 test account Test Data ... 726.34 -- 04/24/2018 In Process
XXXXXXXX0909 test account Test Data ... 6,070.85 -- 04/24/2018 In Process
XXXXXXXX4724 test account Test Data ... 7,400.72 -- 04/24/2018 In Process
XXXXXXXX3391 test account Test Data ... 5,123.36 -- 05/01/2018 In Process
XXXXXXXX6523 test account Test Data ... 1,024.86 -- 05/01/2018 In Process
XXXXXXXX4243 test account Test Data ... 7,573.62 -- 05/01/2018 In Process
Click on accounts to view holding level detail
Quickly see the status of your linked accounts and manage your account credentials

Login Problems

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

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.

Trouble logging in?

What's the problem?

I forgot my password.

I forgot my username.

I need to unlock my account.

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

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

Follow the steps provided to resolve login issues

Please use the link below to reset your password:

https://bd3.bdreporting.com/Auth/Default/ResetPassword/CtEU7X0gT0StVRValXJGdA

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 wealth.

If you have any questions, please contact us.
We are always here for you.

Laurie Ham
COO/CCO
Laurie@rebyadvisors.com