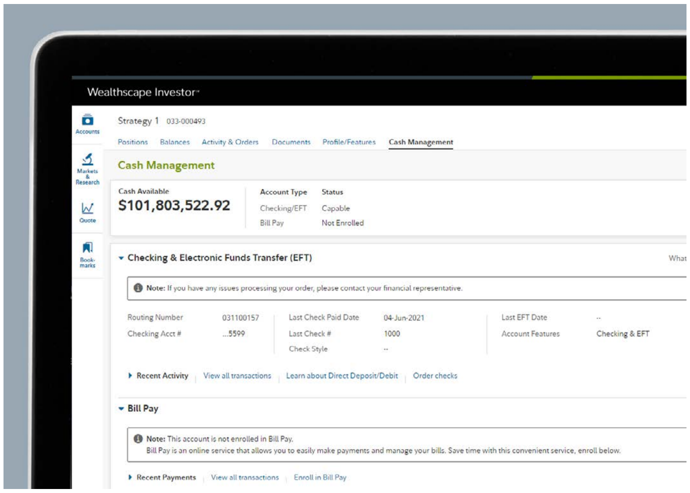
Invest in Your Understanding: Viewing Your Accounts Online

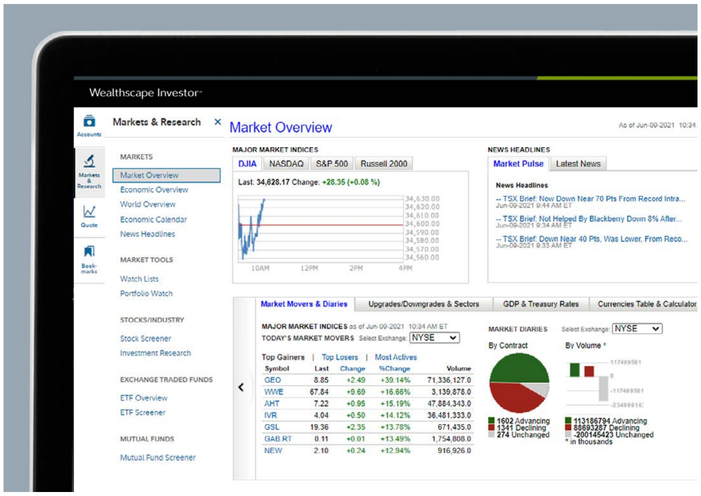
Convenient, on-demand online viewing of your accounts and complete financial picture empowers you with clearer insights for stronger collaboration with your financial professional. This access also provides historical data, tax documents, and the opportunity to reduce paper statement fees by going paperless.

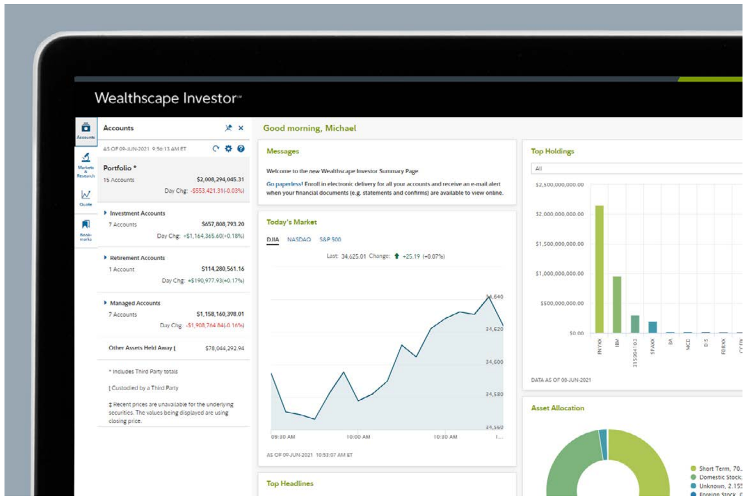
There are three ways to access your accounts online. Your financial professional can give you guidance on this and assist you with any inquiries.

Wealthscape Investor[SM] (Fidelity accounts)

This portal provides comprehensive online access for reviewing investments, offering access to account details, portfolio holdings, and transaction history, along with market research and analysis tools. Clients can conveniently view and download essential documents, utilize self-service capabilities for money transfers* and account management, and leverage mobile features like mobile deposit for on-the-go financial management.



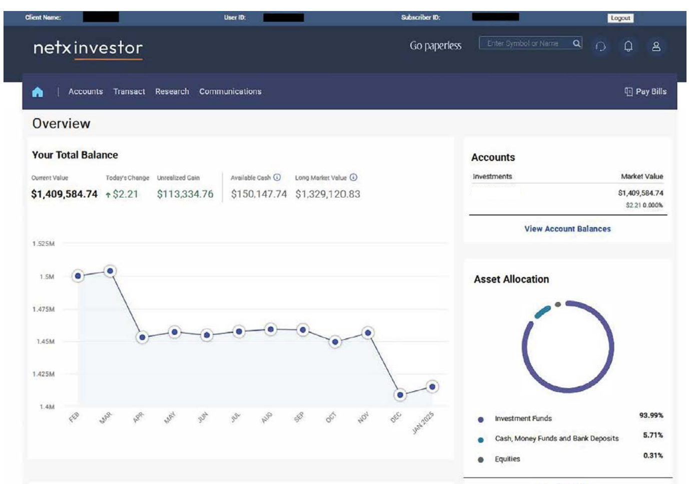


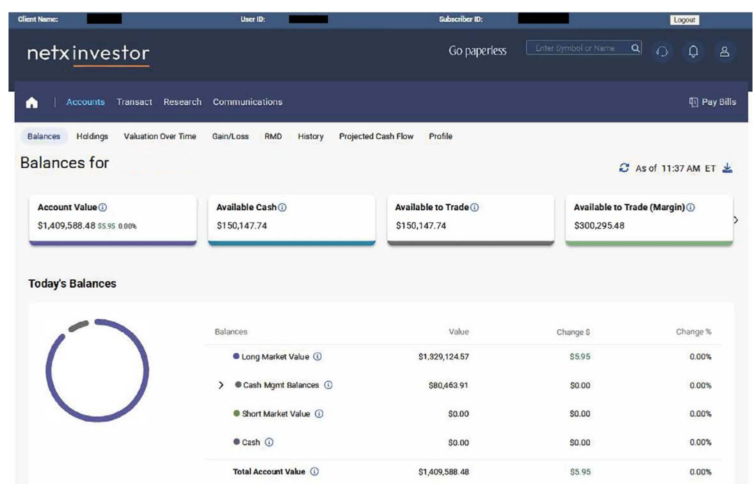


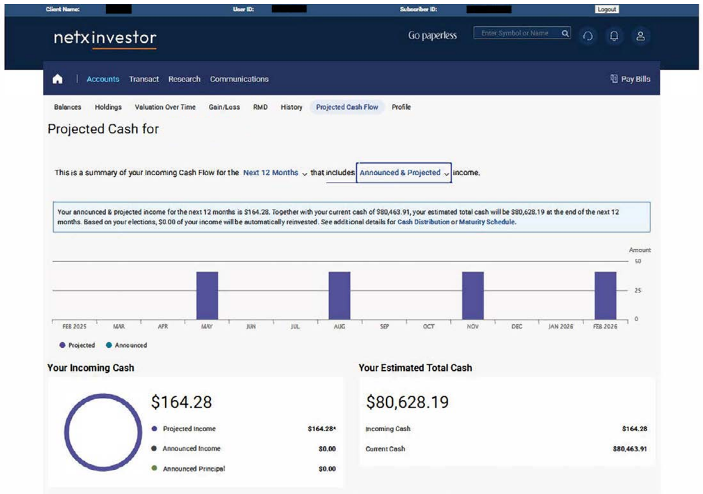
Go to www.wealthscapeinvestor.com to set up your access (note: Streetscape is the original name, and the URL redirects accordingly). Please be sure to enter a cell phone number when prompted for a phone number, as you'll need to receive an SMS verification code each time you log in. For assistance with setup or a password reset, call 888-245-0452 or reach out to your financial professional.

NetXInvestor (Pershing accounts)

This portal provides comprehensive online access for reviewing investments, offering access to account details, portfolio holdings, and transaction history, along with market research and analysis tools. Clients can conveniently view and download essential documents, utilize self-service capabilities for money transfers* and account management, and leverage mobile features like mobile deposit for on-the-go financial management.



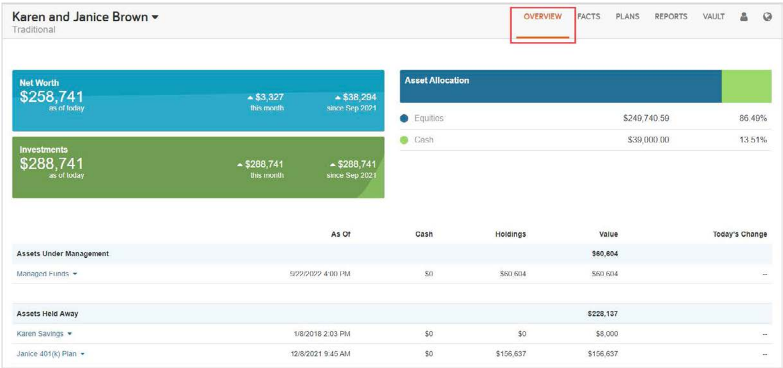


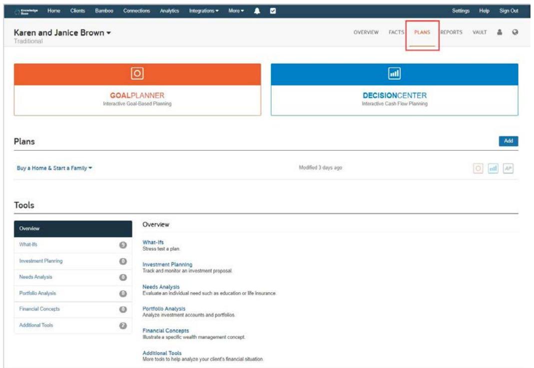


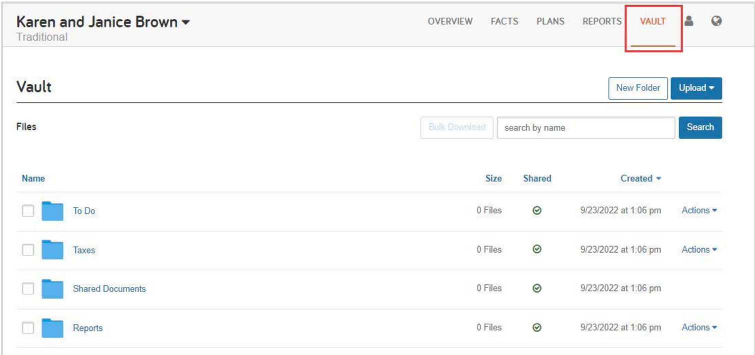
Go to www.netxinvestor.com to set up your access. Please be sure to enter a cell phone number when prompted for a phone number, as you'll need to receive an SMS verification code each time you log in. For assistance with setup or a password reset, call 888-245-0452 or reach out to your financial professional.

CLIC Client

You can view your entire financial picture with the CLIC® Client portal. Track progress on your financial goals, monitor spending, create budgets, view your investments and allocations at the account and household levels, link outside bank and investment accounts, and store key documents in the secure client document vault. You can access CLIC Client using a web browser only at this time.



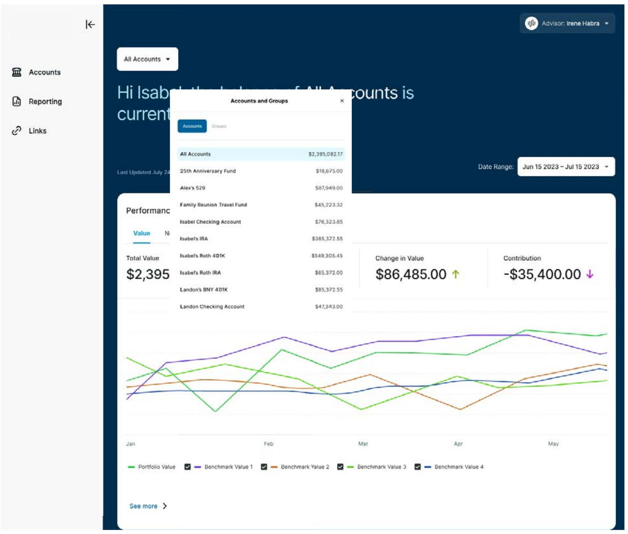


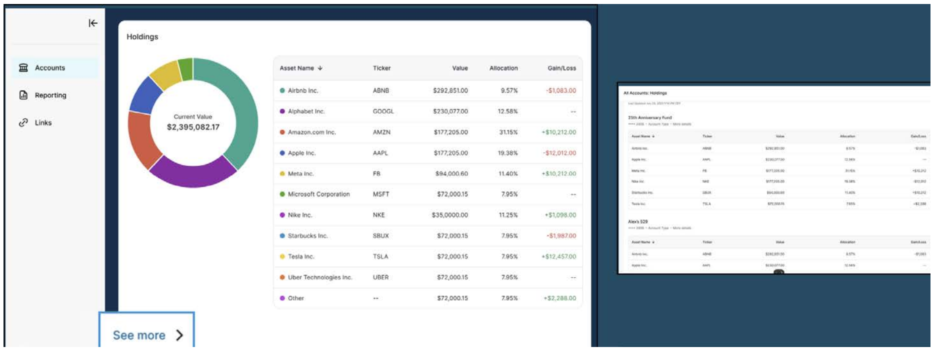


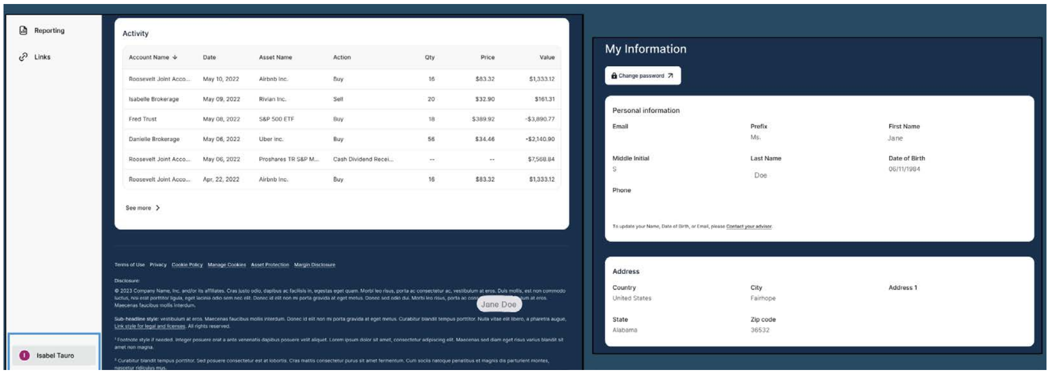
You will need to request access from your financial professional. Then you'll receive an email from noreply@clicclient.com with a link to set up your online access. This link will expire in seven days – or immediately after it's used. Wait until you're ready to complete registration before clicking the link, as the process takes about 10 minutes. Please be sure to enter a cell phone number when prompted for a phone number, as a verification code will be texted to that number each time you log in.

CIRStatements

View your investments, asset allocation, performance, activity, and more at both the account and household levels. CIRStatements is accessible via web browser and the mobile app.







You will need to request access from your financial professional. Then you'll receive two emails from DONOTREPLY@albridge.com to set up your online access. One will contain a link to register and the other will have a one-time access code. The link expires in 24 hours – or after it's clicked. Wait until you're ready to complete registration before clicking the link, as the process takes about five minutes. After selecting Save and Send code, you'll receive a one-time verification code by email. Enter the code to return to the login screen and sign in with your new credentials. You'll be prompted to authenticate with a two-step verification code sent via text message or email. For security purposes, two-step authentication is required each time you log in.

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CANTELLA

*Please note that accounts must have ACH bank instructions on file for this, and certain account types are not permitted to have money movement entitlements. If you would like to add this feature to your access or if you have any questions, please reach out to your financial professional.