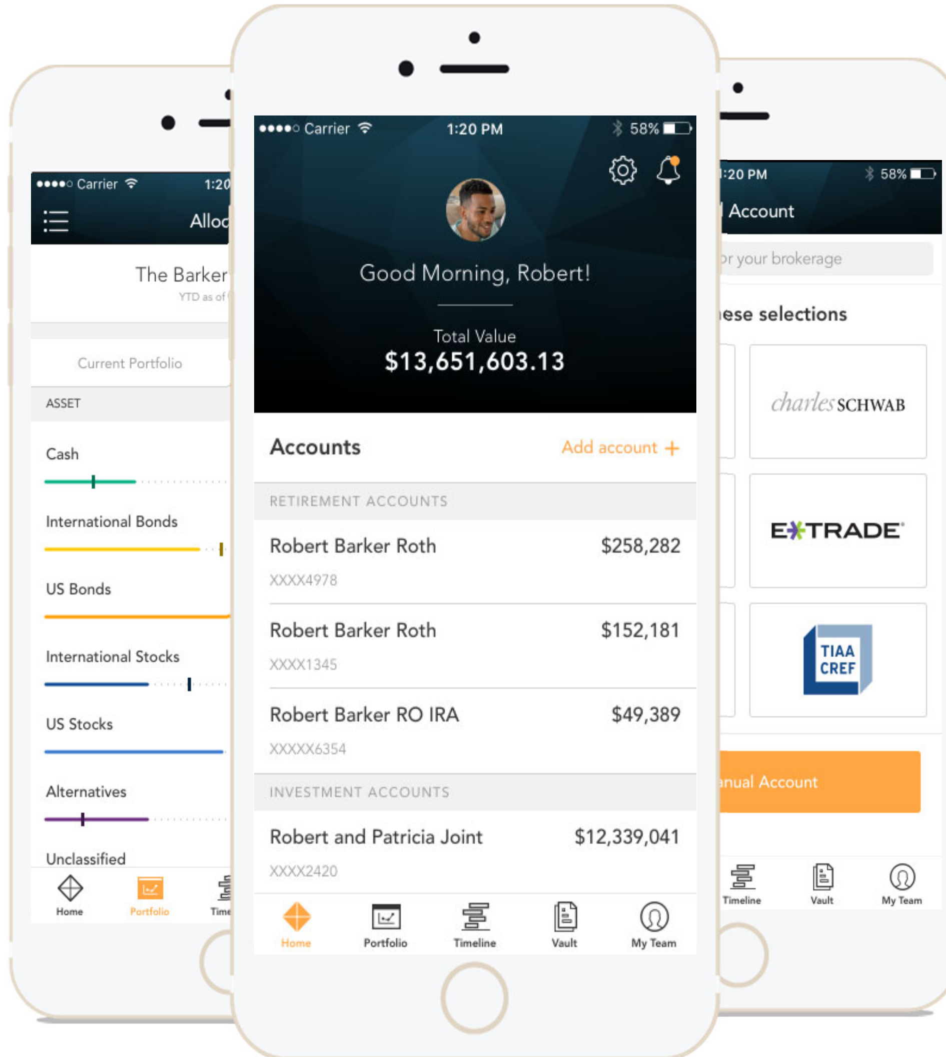
WELCOME TO THE BIRCHWOOD CLIENT PORTAL

BIRCHWOOD
FINANCIAL PARTNERS
Knowledge. Insight. Wisdom.

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.



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
Login Questions	Helpful hints

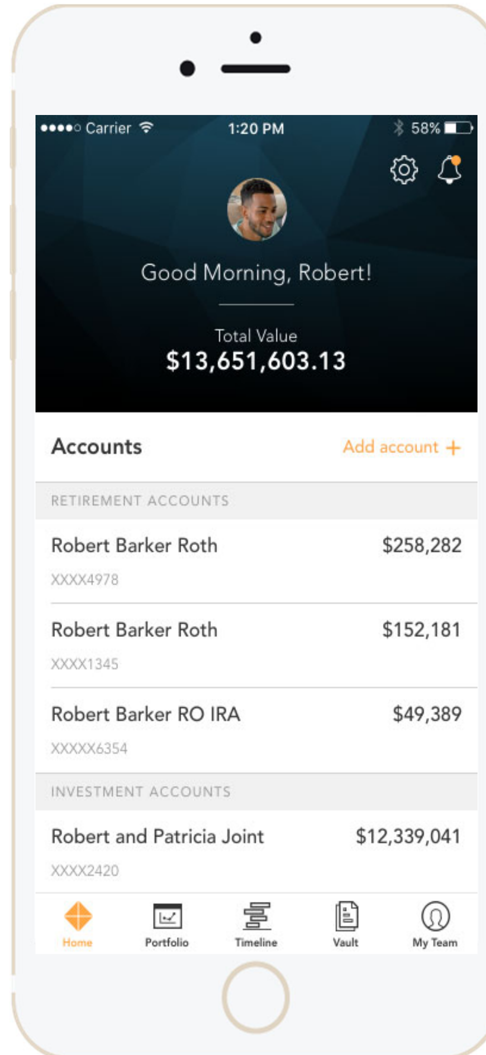
Home Page

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.

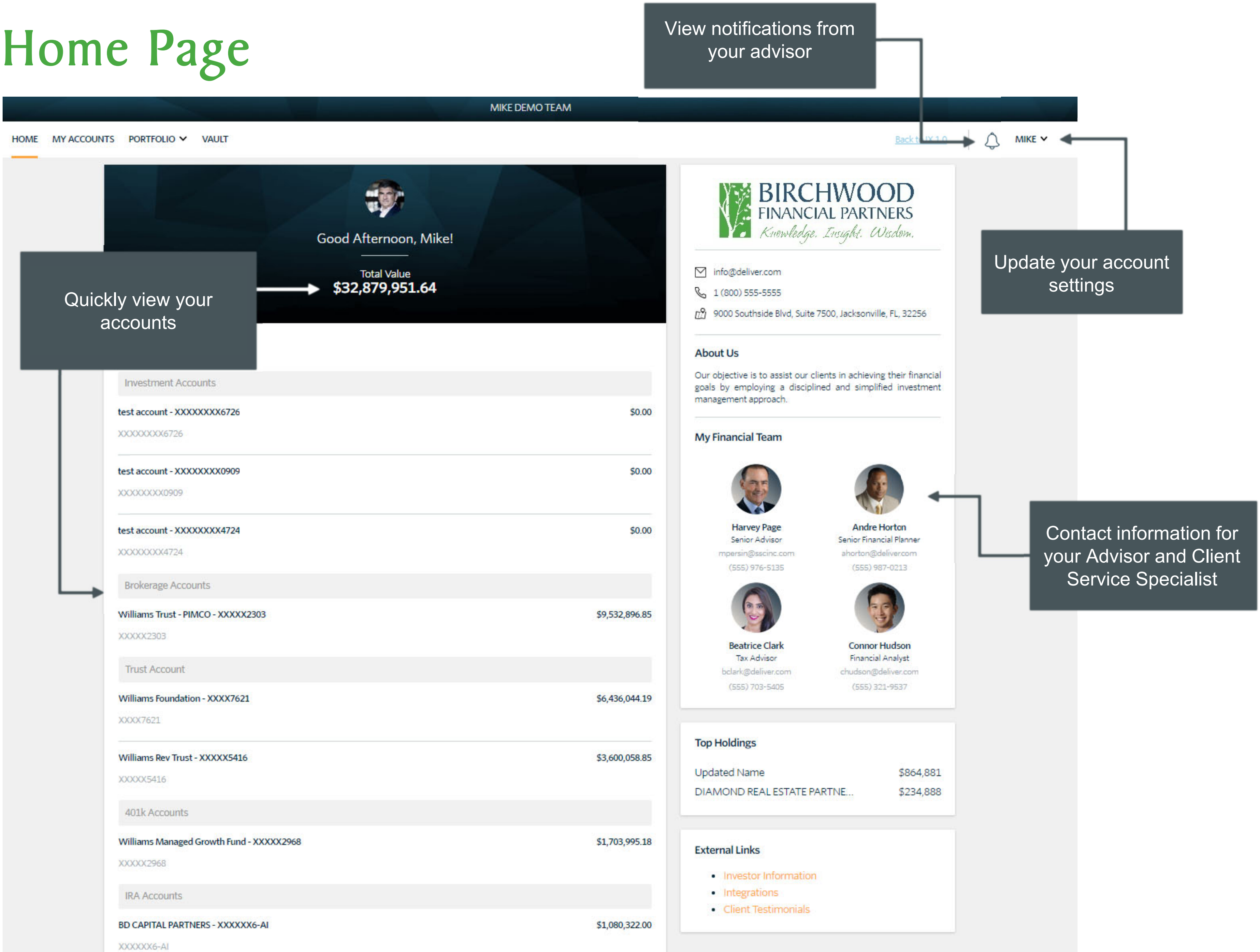
Your accounts and total portfolio value are listed front and center.

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

You can also quickly contact your Advisor while on the go.



Home Page


View notifications from your advisor
Update your account settings
Quickly view your accounts
Contact information for your Advisor and Client Service Specialist
MIKE DEMO TEAM
HOME
MY ACCOUNTS
PORTFOLIO
VAULT
MIKE
Good Afternoon, Mike!
Total Value
$32,879,951.64
Investment Accounts
test account - XXXXXXXX6726 $0.00
XXXXXXXX6726
test account - XXXXXXXX0909 $0.00
XXXXXXXX0909
test account - XXXXXXXX4724 $0.00
XXXXXXXX4724
Brokerage Accounts
Williams Trust - PIMCO - XXXXX2303 $9,532,896.85
XXXXX2303
Trust Account
Williams Foundation - XXXX7621 $6,436,044.19
XXXX7621
Williams Rev Trust - XXXXX5416 $3,600,058.85
XXXXX5416
401k Accounts
Williams Managed Growth Fund - XXXXX2968 $1,703,995.18
XXXXX2968
IRA Accounts
BD CAPITAL PARTNERS - XXXXXX6-AI $1,080,322.00
XXXXXX6-AI
BIRCHWOOD
FINANCIAL PARTNERS
Knowledge. Insight. Wisdom.
info@deliver.com
1 (800) 555-5555
9000 Southside Blvd, Suite 7500, Jacksonville, FL, 32256
About Us
Our objective is to assist our clients in achieving their financial goals by employing a disciplined and simplified investment management approach.
My Financial Team
Harvey Page
Senior Advisor
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(555) 976-5135
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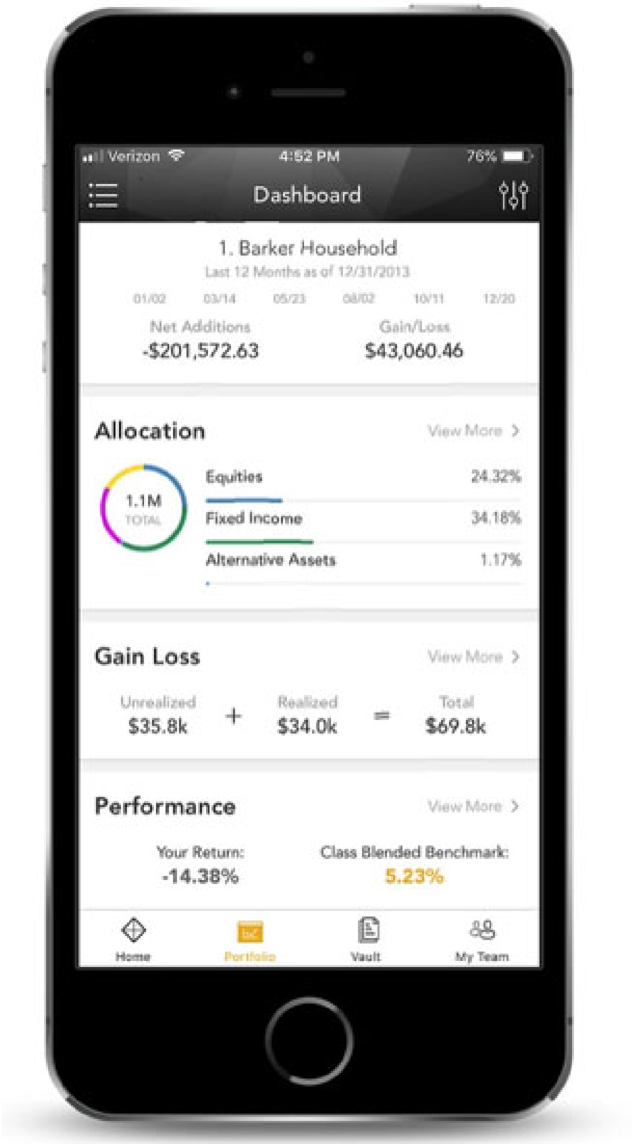
(555) 987-0213
Beatrice Clark
Tax Advisor
bclark@deliver.com
(555) 703-5405
Connor Hudson
Financial Analyst
chudson@deliver.com
(555) 321-9537
Top Holdings
Updated Name $864,881
DIAMOND REAL ESTATE PARTNE... $234,888
External Links
Investor Information
Integrations
Client Testimonials

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.

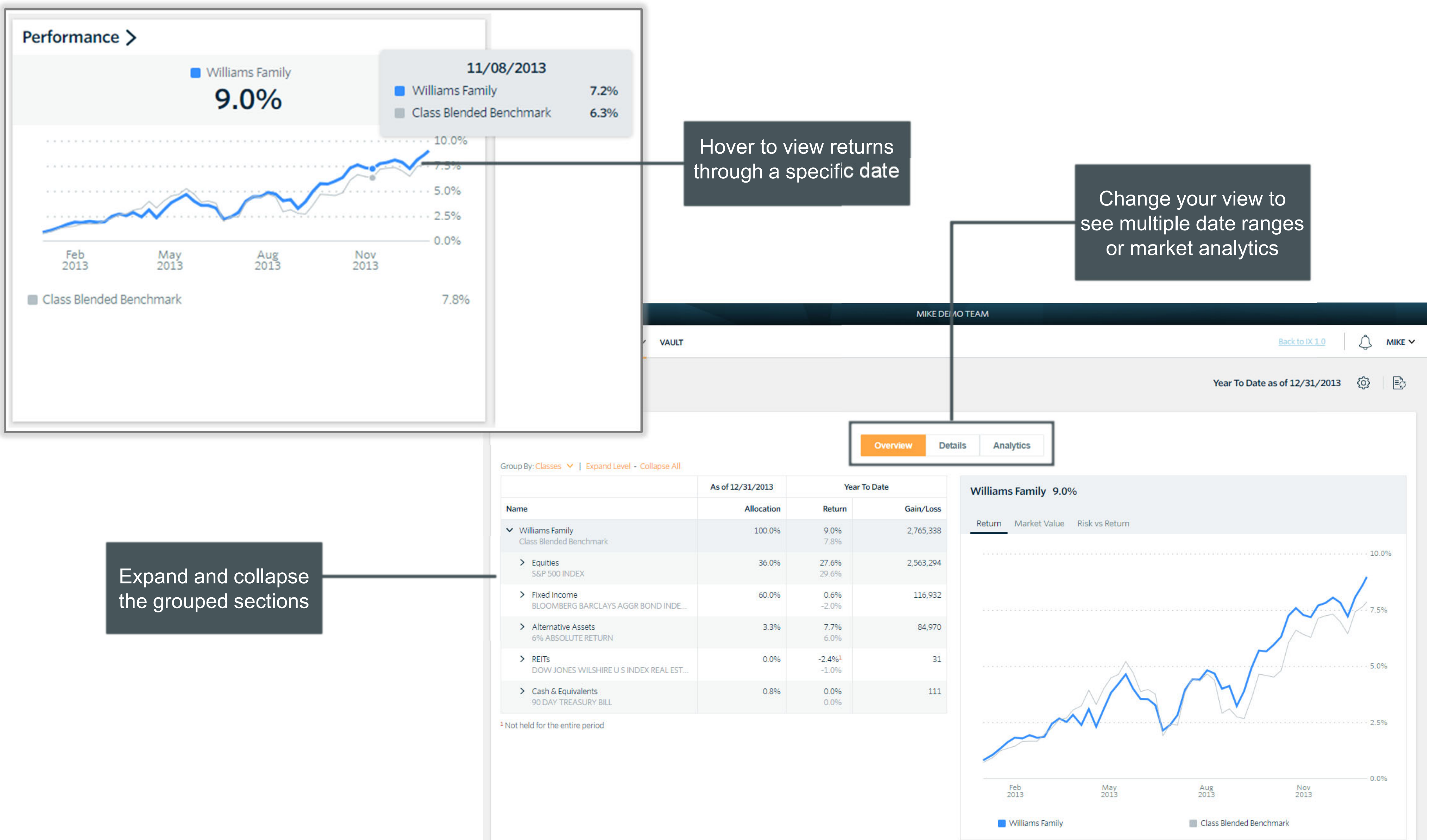


Portfolio

Click for customized date ranges
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
Performance
Williams Family
9.0%
10.0%
7.5%
5.0%
2.5%
0.0%
Feb 2013
May 2013
Aug 2013
Nov 2013
Advizr
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
32,879,952
Assets 32,879,952
32.9M
Brokerage Accounts 29.0%
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

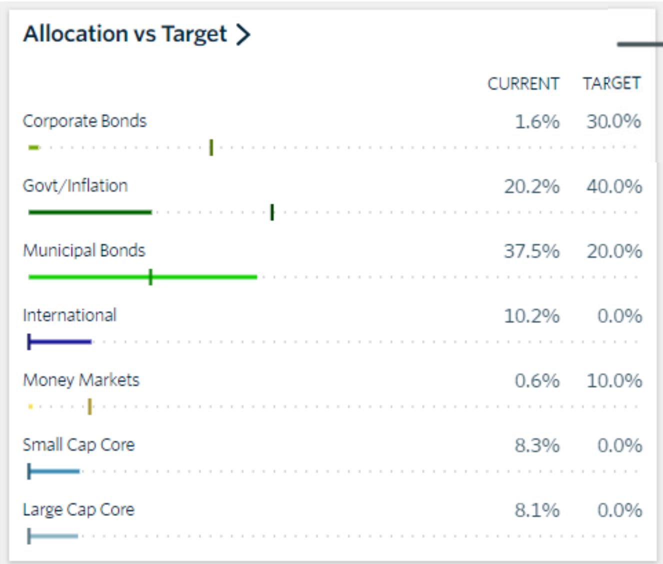
Performance Card

View investment performance across your portfolio



Allocation vs Target

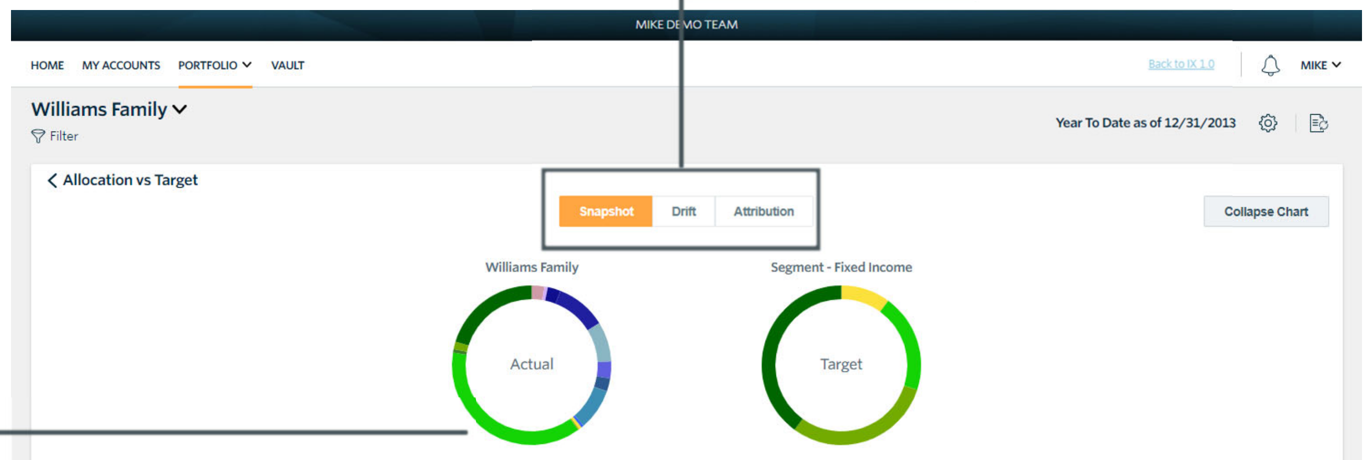
Compare your current allocation to your portfolio targets



Quickly view your current allocation relative to your target

Compare your allocation to your target on a single day in snapshot or compare for a period of time using drift charts

Hover over the donut chart to view grouping level allocation detail



Name	Symbol	Allocation	Target Allocation	Allocation Differe...	Ending Value	Target Value	Market Value Diff...
Williams Family	--	**100.0%**	**100.0%**	**0.0%**	**32,879,952**	**32,879,952**	**0**
Limited Partnerships	--	2.6%	0.0%	2.6%	845,434	0	845,434
Real Estate	--	0.7%	0.0%	0.7%	234,888	0	234,888
Emerging Markets	--	2.6%	0.0%	2.6%	856,811	0	856,811
International	--	10.2%	0.0%	10.2%	3,369,350	0	3,369,350
Large Cap Core	--	8.1%	0.0%	8.1%	2,656,984	0	2,656,984
Mid Cap Core	--	3.4%	0.0%	3.4%	1,131,899	0	1,131,899
Mid Cap Growth	--	2.6%	0.0%	2.6%	860,311	0	860,311
Mid Cap Value	--	0.1%	0.0%	0.1%	23,283	0	23,283
Small Cap Core	--	8.3%	0.0%	8.3%	2,741,785	0	2,741,785
Small Cap Growth	--	0.5%	0.0%	0.5%	159,110	0	159,110
Small Cap Value	--	0.1%	0.0%	0.1%	30,305	0	30,305
Cash	--	0.0%	0.0%	0.0%	1,387	0	1,387
Money Markets	--	0.6%	10.0%	-9.4%	188,104	3,287,995	-3,099,891
Tax-Exempt MM	--	0.2%	0.0%	0.2%	59,684	0	59,684
Municipal Bonds	--	37.5%	20.0%	17.5%	12,342,799	6,575,990	5,766,808

Activity Summary

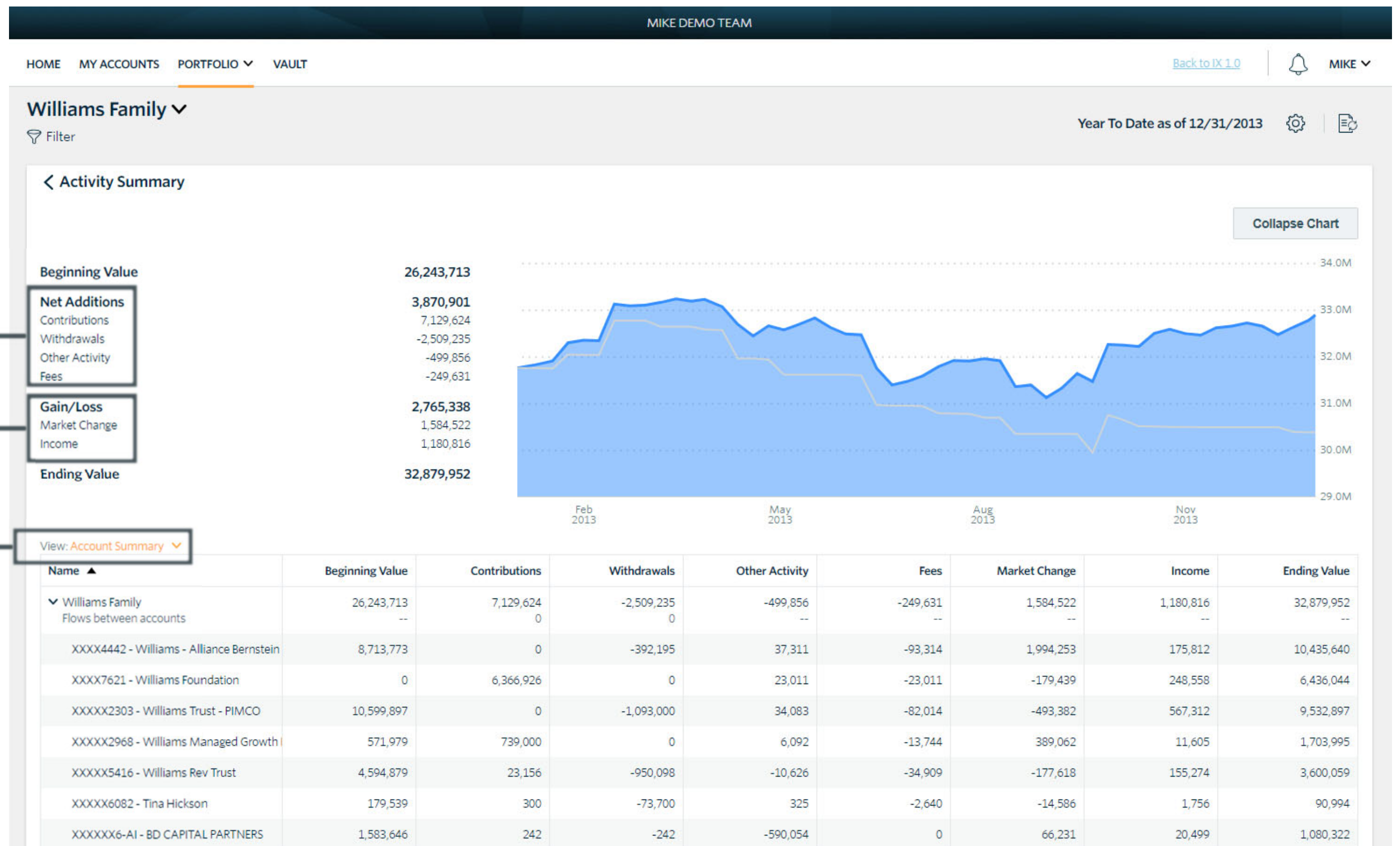
View activity and changes in your portfolio or account balance

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

View breakout of additions and withdrawals

See income and performance breakouts

Toggle to view either summary detail or transactions



Name ▲	Beginning Value	Contributions	Withdrawals	Other Activity	Fees	Market Change	Income	Ending Value
Williams Family	26,243,713	7,129,624	-2,509,235	-499,856	-249,631	1,584,522	1,180,816	32,879,952
Flows between accounts	--	0	0	--	--	--	--	--
XXXX4442 - Williams - Alliance Bernstein	8,713,773	0	-392,195	37,311	-93,314	1,994,253	175,812	10,435,640
XXXX7621 - Williams Foundation	0	6,366,926	0	23,011	-23,011	-179,439	248,558	6,436,044
XXXXX2303 - Williams Trust - PIMCO	10,599,897	0	-1,093,000	34,083	-82,014	-493,382	567,312	9,532,897
XXXXX2968 - Williams Managed Growth	571,979	739,000	0	6,092	-13,744	389,062	11,605	1,703,995
XXXXX5416 - Williams Rev Trust	4,594,879	23,156	-950,098	-10,626	-34,909	-177,618	155,274	3,600,059
XXXXX6082 - Tina Hickson	179,539	300	-73,700	325	-2,640	-14,586	1,756	90,994
XXXXXX6-AI - BD CAPITAL PARTNERS	1,583,646	242	-242	-590,054	0	66,231	20,499	1,080,322

Transactions

View and filter the most recent transactions in your portfolio

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

Filter by transaction type

Settings

Supervised
- (•) All Assets
- ( ) Supervised Only
- ( ) Unsupervised Only

Transaction Type Filter

Select filters to apply to data table (not applicable to the Dashboard Summary)

Select All - Deselect All

- [ ] Buys
- [ ] Sells
- [ ] Management Fees
- [ ] Expenses
- [ ] Capital Gains
- [ ] Income
- [ ] Alternatives
- [ ] Other
- [ ] Contributions
- [ ] Withdrawals

Apply | Cancel

MIKE DEMO TEAM

HOME | MY ACCOUNTS | PORTFOLIO | VAULT | Back to IX 1.0 | MIKE

Williams Family

Filter

Year To Date as of 12/31/2013

< Transactions

Filters - 2 Types

Buys
Sells

Date	Account Number	Account Name	Action	Type	Asset Name	Symbol	Units	Price	Amount	Description
12/24/13	XXXXX2303	Williams Trust - PIMCO	Buy	Buy	FEDERAL HOME LN BK CONS DISC NOTES 0.000% 01/02/14 B/EDTD 01/02/13	313385RG3	200,000	100	199,988	--
12/24/13	XXXXX2303	Williams Trust - PIMCO	Sale	Sale	FEDERAL HOME LN BK CONS DISC NOTES 0.000% 01/02/14 B/EDTD 01/02/13	313385RG3	200,000	100	-199,988	--
12/24/13	XXXXX6082	Tina Hickson	Buy	Buy	ISHARES INC MSCI MEXICO	EWW	36	68	2,438	--
12/23/13	XXXXX6082	Tina Hickson	Buy	Buy	ISHARES INC MSCI MEXICO	EWW	33	67	2,218	--
12/23/13	XXXXX6082	Tina Hickson	Buy	Buy	WISDOMTREE JAPAN HEDGED EQUITY	DXJ	45	50	2,266	--
12/23/13	XXXXX6082	Tina Hickson	Sale	Sale	MARKET VECTORS ETF TR VIETNAM ETF	VNM	675	18	-12,406	--

Sort column headers to quickly organize your transactions

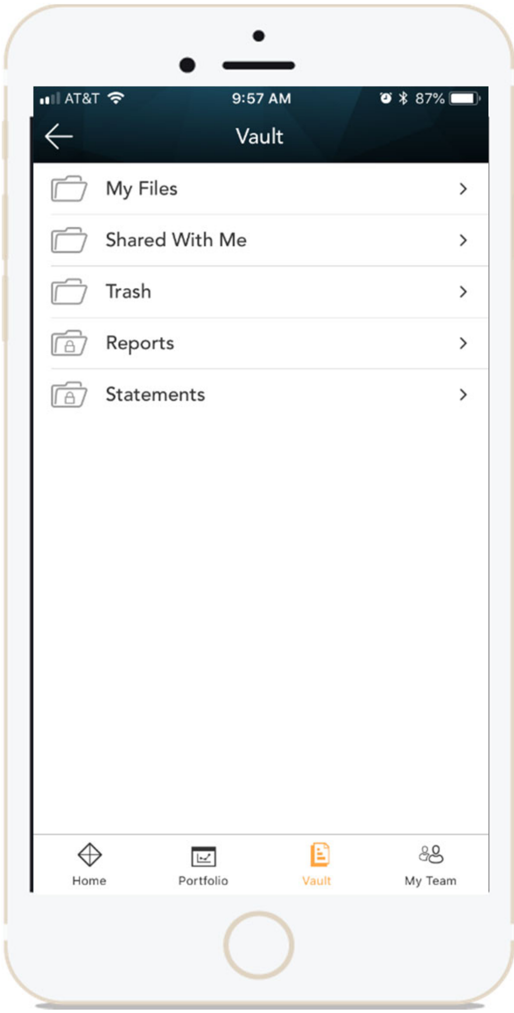
Vault

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.

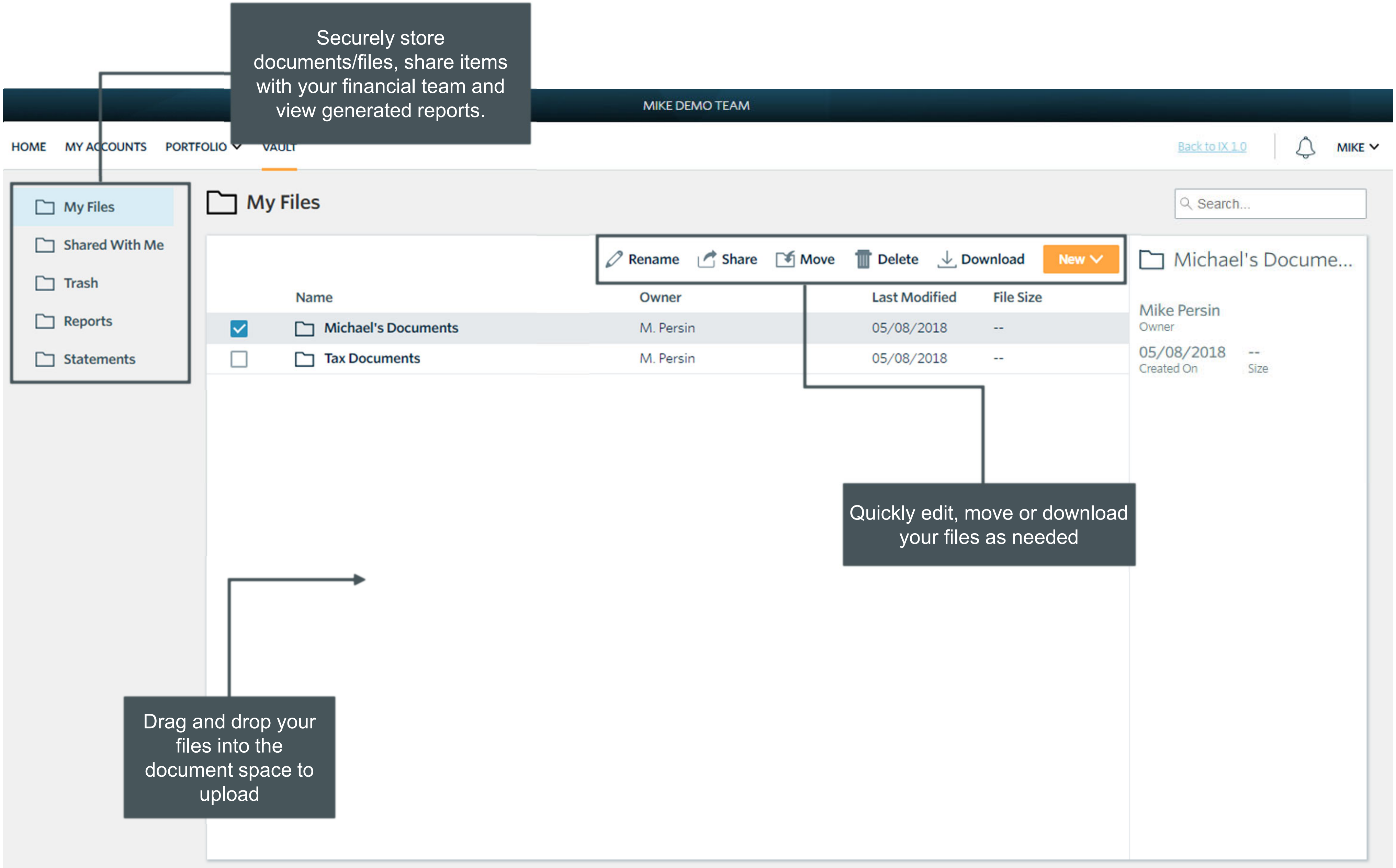
From here, you can organize your documents into folders, drag-and-drop to upload new documents, and easily move files from one folder to another.

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

From the Reports folders, you have quick access to view your quarterly performance reports.



Vault


Securely store documents/files, share items with your financial team and view generated reports.
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

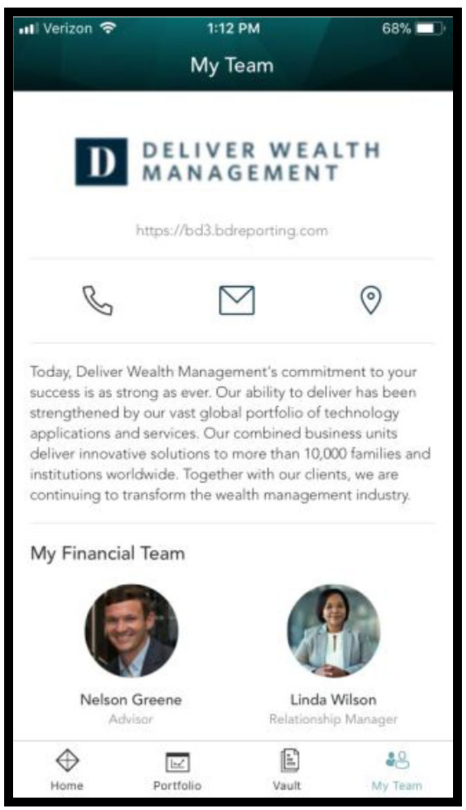
Mobile Application

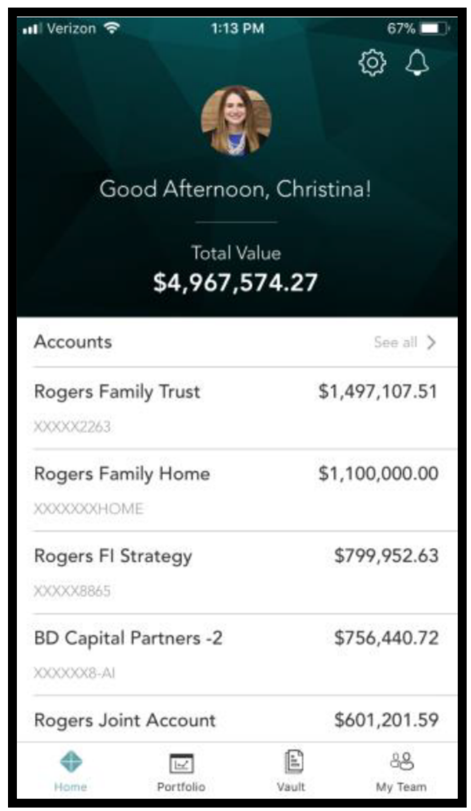
Download the Client Experience from the Apple App Store or Google Play

Please click on the below link to download the Black Diamond app for your device:

APPLE APP STORE

GOOGLE PLAY

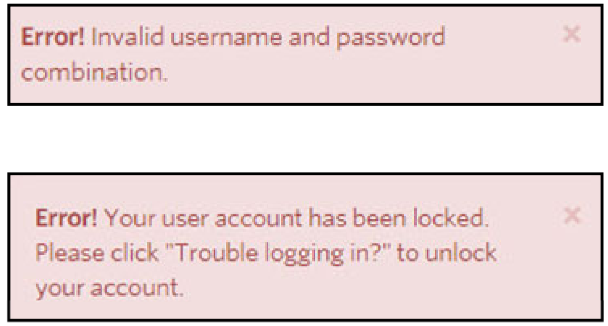




Touch Icon

Login Problems

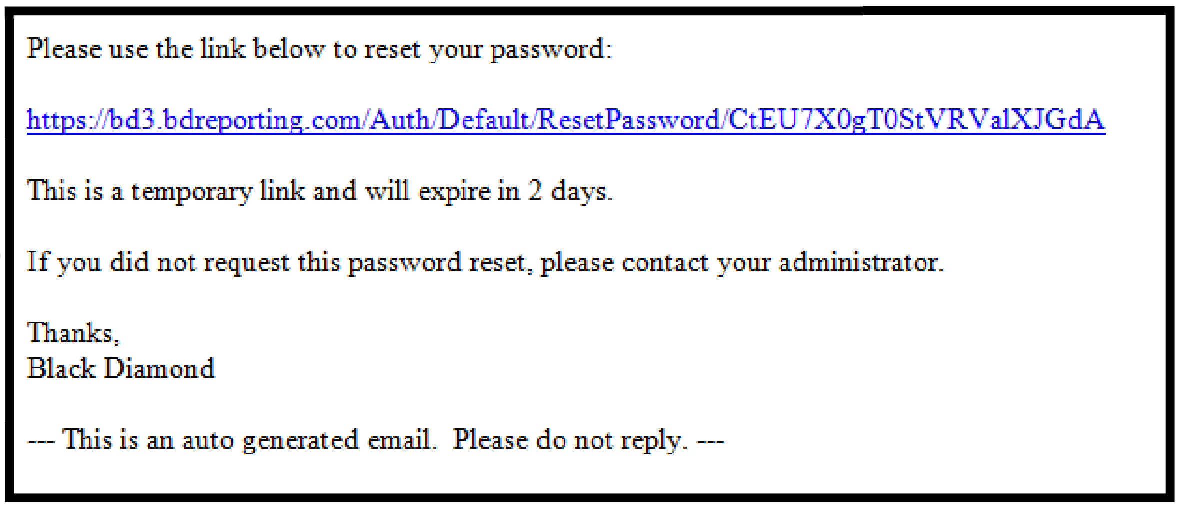
How to access your account if you have trouble signing in to the site



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 Birchwood Client Portal keeps you connected to your financial life, your advisory team, and everything else you need for managing your wealth.

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If you have any questions, please contact us.
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952-885-9088