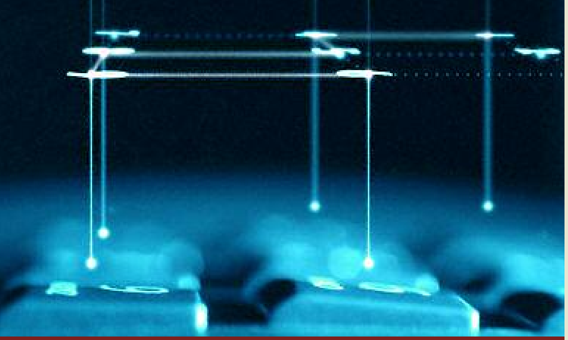

Client Access to Wealth Reporting

MONITORING THE PERFORMANCE OF YOUR ASSETS

- Web-based access to asset holdings and complete portfolio performance anytime, anywhere
- Secure and easy to use
- Play a more active role in understanding your financial plan
- Automated reporting ensures that you have access to more accurate information
- Access the same reports your financial advisor prepares

Monitor the performance of all of your asset holdings anytime, anywhere on a secure Web site that both you and your advisor can access.

With Albridge Wealth Reporting, you and your financial advisor can view and measure the performance of all of your assets anytime, anywhere. While your advisor is charting the performance of your portfolio against your goals, you can track this progress on-demand and play a more active role in understanding your financial plan.

Access the same reports as your financial advisor.

Using Albridge Wealth Reporting, you have the ability to generate the same reports as your financial advisor, including performance history, asset holdings, tranaction reports and more. You have the flexibility to specify a time range or reporting period that may be of interest to you, and to add accounts that may not be in the system automatically (e.g., bank accounts). Having the same information as your financial advisor ensures clear and consistent communication while working toward your financial goals.

It's simple to get started.

1. Your advisor will provide you with a registration link.
2. Enter your social security number with no dashes or spaces and the temporary password provided by your advisor, then click on the "Next" button.
3. Read and accept the "User Agreement" by clicking on the "Accept" button.
4. Create your own Username and Password (both can be any combination of letters and numbers without spaces) between 6-10 characters.
5. Complete the "Personal" and "Business Information" fields. Fields marked with a red asterik are required. Click the "Next" button.
6. After receiving email notification that you have completed the registration process, your advisor will activate your access to the system.
7. Once you are activated, use the accounts link "Accts" to verify that all of your accounts are represented in the system.

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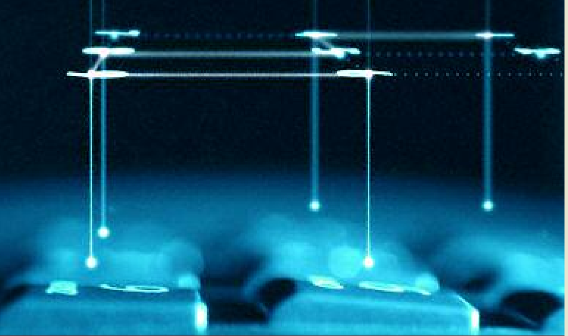


CONNECTING CLIENTS AND ADVISORS TO MEET FINANCIAL GOALS

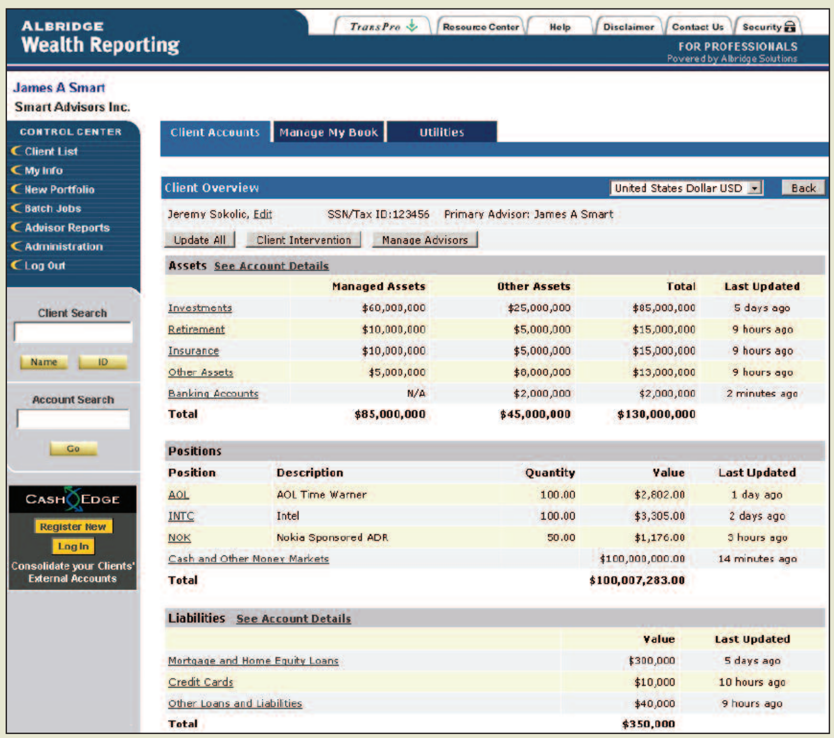
- Brokerage Accounts
- Bank Accounts
- 401(k)s
- Trust Accounts
- Separately Managed Accounts
- 529s
- Roth IRAs
- Insurance and Annuities
- Pension Plans

Client Access to Wealth Reporting

You wouldn't have your contractor build a house without a complete blue print, so why would you have your financial advisor construct a financial plan without a complete view of all of your assets?

Financial advisors who have the ability to view all of their clients' assets, including those they do not actively manage, can deliver a more complete financial plan and report on the progress of your entire portfolio. Enabling your advisor to view all of your assets provides them with the foundation required to deliver well informed investment advice to meet your specific investment objectives.

The Albridge Data Aggregation tool offers you and your advisor a convenient one-stop method to view and monitor accounts held by various financial institutions. This tool enhances the scope, quality and frequency of advice provided by your financial advisor. By offering clients an online hub that helps them organize their financial lives, your financial advisor can also provide you with better service.



Is my information secure?

All of your infromation is stored online in an encryped environment that is built with the same protocols as bank and financial company Web sites (128 bit encryption).

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