

SIGNATUREFD

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QUICK START GUIDE TO NAVIGATING THE PORTFOLIO DASHBOARD

The Portfolio Dashboard provides access to your portfolio information. You will be able to access quarterly and monthly statements and run up-to-date reports for your portfolio.

This Quick Start Guide includes basic navigation and report information; your available options may vary.



Go to www.signaturefd.com/client-login using your Internet browser (Internet Explorer, Firefox, Safari, Google Chrome).

1. Logging In

Enter the user ID and temporary password provided by SignatureFD and click **Login**.

Please Log In

User ID:

Password:

** Passwords are case sensitive.*

Login


2. Password Reset

You will be prompted to reset your password after you enter the temporary password provided by SignatureFD.

Please note: A password must meet the following requirements:

- Has a minimum of 8 characters
- Includes at least a number and/or a special character (/ \$ % () = * + # ' - _ . : @)
- Does not use "password" or any variation of the word

Password Reset

 Your password needs to be reset. Please reset your password by completing the form below.

New Password:

Re-type New Password:

Security Question:

Answer:

Re-type Answer:

Update

3. Security Question and Answer

Choose a security question and answer that are easy for you to remember in the event you need to reset your password in the future.

4. Access the Portfolio Dashboard

Click **Update** and navigate within the portfolio dashboard to your desired location.



Your one-stop portfolio review.

1. Snapshot

This chart shows the portfolio's current allocation across asset classes. Please note that these figures include any unmanaged accounts or assets.

2. Activity Summary

Shows account value and performance information at a glance.

3. Asset Allocation

Select an account to view detailed allocation percentages and values.

4. Portfolio Web Content

The Portfolio Web Content section will display recent SignatureFD news and information. You can also find links to helpful documents, including this guide.

5. Statements

You can click on a recent monthly or quarterly statement to view it in PDF format.

6. Recent Activity

The most recent transactions in your portfolio are displayed here.

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Financial Design for Life

Portfolio > My Portal Laura Hubbell

Portfolio Dashboard

Household: [REDACTED]

Snapshot

Asset Category	Value
Equity	\$3,486,440.46
Alternatives	\$1,732,483.31
Fixed Income	\$763,808.11
Cash	\$150,904.00
Household Total:	\$6,133,635.88

Activity Summary

	QTD 4/1/2015 - 4/30/2015	YTD 1/1/2015 - 4/30/2015	Inception 1/1/2009 - 4/30/2015
Beginning Market Value (including Bond Accrual)	\$5,642,013.77	\$5,548,309.74	\$1,051,942.15
Contributions	\$51,143.69	\$55,179.07	\$2,555,789.48
Distributions	(\$34,000.00)	(\$34,000.00)	(\$484,529.00)
Transfer In/Out	\$3,743.26	\$3,743.26	(\$713,828.46)
Bond Accrual	\$0.00	\$0.00	\$0.00
Market Value Increase/Decrease	\$67,062.07	\$155,730.72	\$3,220,588.62
Ending Market Value (including Bond Accrual)	\$5,729,962.79	\$5,729,962.79	\$5,729,962.79
Time Weighted Return (Net)	1.19 %	2.81 %	7.72 %

Returns are Net of Fees
* Initial contribution amounts
** The first 12 month returns are not annualized

Asset Allocation

Accounts (Select an Account)	
Schwab [REDACTED]	11/05/2014
ByAllAccounts [REDACTED]	10/13/2014
Manually Managed [REDACTED]	01/30/2009
Schwab [REDACTED]	02/02/2005
529 College Savings Plan [REDACTED]	01/31/2007
529 College Savings Plan [REDACTED]	04/11/2011
TIAA-CREF Annuity [REDACTED]	07/02/2012
Manually Managed [REDACTED]	08/03/2009
Schwab [REDACTED]	02/24/2005
Schwab [REDACTED]	04/04/2003
Schwab [REDACTED]	02/13/2003
TIAA-CREF Annuity [REDACTED]	07/07/2006
Schwab [REDACTED]	12/24/2002
Schwab [REDACTED]	12/17/2002
Schwab [REDACTED]	04/07/2003

Portfolio Web Content

Resources

- [Understanding Your Portfolio Performance Report](#) (Updated: October 2013)
- [Quick Start Guide to Navigating the Portfolio Dashboard](#) (Updated: May 2014)

Events

May 13, 2015
[I Dare Myself: Reboot and Recharge Your Life](#)

News and Articles

Apr 21, 2015
[News or Noise: Central Banks Speak, Long-Term Bond Yields Go Negative](#)
European Central Bank's commitment to quantitative easing, Chinese reaction to weak economic data, a...

Statements

Statements

- 2015 - 1st Quarter Statement
- 2015 - February Statement
- 2015 - January Statement
- 2014 - 4th Quarter Statement
- 2014 - November Statement
- 2014 - October Statement

Recent Activity

Date	Type	Product	Amount	Status
4/23/2015	Sell	RS Global Natural Resources		Complete
4/23/2015	Buy	Schwab Money Market		Complete
4/23/2015	Interest Reinvested	TIAA Traditional Account		Complete
4/23/2015	Interest Reinvested	TIAA Traditional Account		Complete
4/22/2015	Management Fee	Schwab Money Market		Complete
4/22/2015	Merge In from Other Account	Schwab Money Market		Complete
4/22/2015	Management Fee	Schwab Money Market		Complete
4/22/2015	Management Fee	Schwab Money Market		Complete

More

Select **More** on any section on the dashboard to see more detail related to the information displayed.

The Portfolio Dashboard provides access to your portfolio information. You will be able to access quarterly and monthly statements and run up-to-date reports for your portfolio.

1. Dashboard and Portfolio Dashboard

Clicking here will bring you back to the main page, which provides a quick overview of up-to-date portfolio information.

2. Custom Portfolio Performance Report

Here you can run a PDF or Excel report showing performance information for a custom date range. You can find instructions on how to choose dates and file format on the next page of this document. The document "Understanding Your Portfolio Performance Report" provides a more detailed explanation of the information presented on the Custom Portfolio Performance Report.

3. Statements

The statements section will allow you to view recent monthly and quarterly statements prepared by SignatureFD.

4. Custom Portfolio Value Report

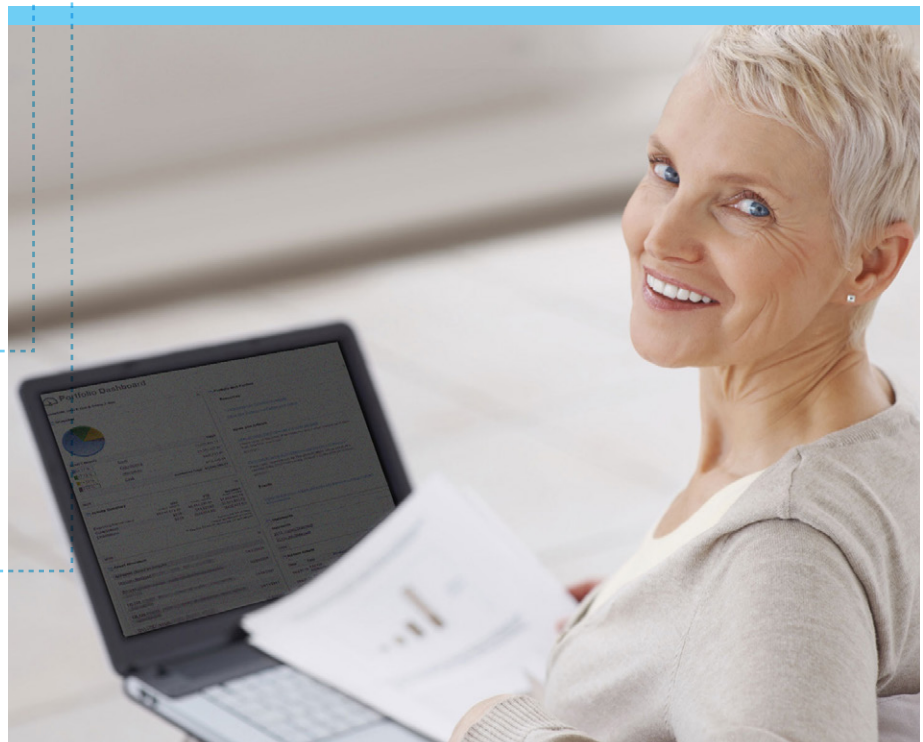
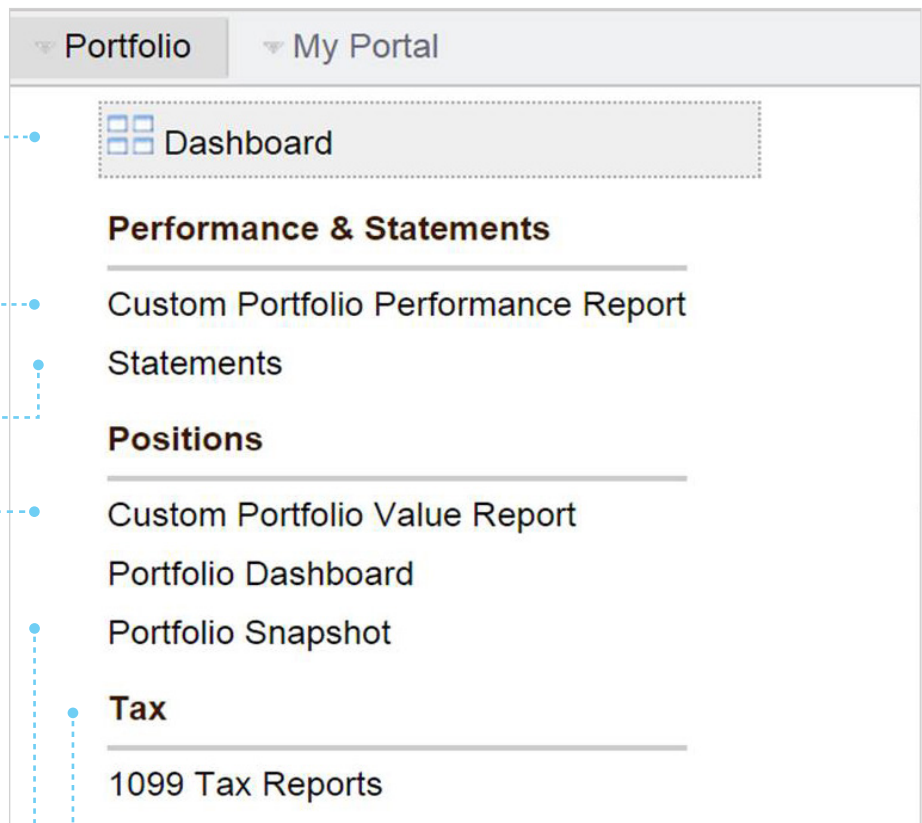
Here you can run a PDF or Excel report showing portfolio value and positions as of a custom date. You can find instructions on how to choose date and format on the next page of this document.

5. Portfolio Snapshot

This section will bring you to a Web page with detailed position and account information as of the current date.

6. Tax Reporting

Here you will find downloadable reports to aid you in tax preparation, including 1099s from custodians, K-1s from private funds, and SignatureFD account statements.



Each portfolio report has parameters that you have the option to select or change before generating a report. Below are key highlights of these options.

1. Run For

Reports should generally be run at a household level, which will aggregate all accounts together. However, if you need to run a report on a particular account, you can select that account by clicking on the down arrow next to the portfolio title.

2. Date Range

Here you can select your date range by clicking on one of the preset date range options or by specifying your own custom dates.

3. Delivery Method

Select how you would like the report delivered:

- **Direct Download:** You download the report to your computer or other device.
- **Report Inbox:** The report will save to your Report Inbox under My Portal.
- **Cloud Storage:** You also have the option to set up a cloud storage provider to save your report.

4. Format

Choose to generate the report as a PDF or an Excel document. You can also choose whether you want the report delivered as a zip file.

Disclosures and Disclaimers

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