

# SIGNATUREFD

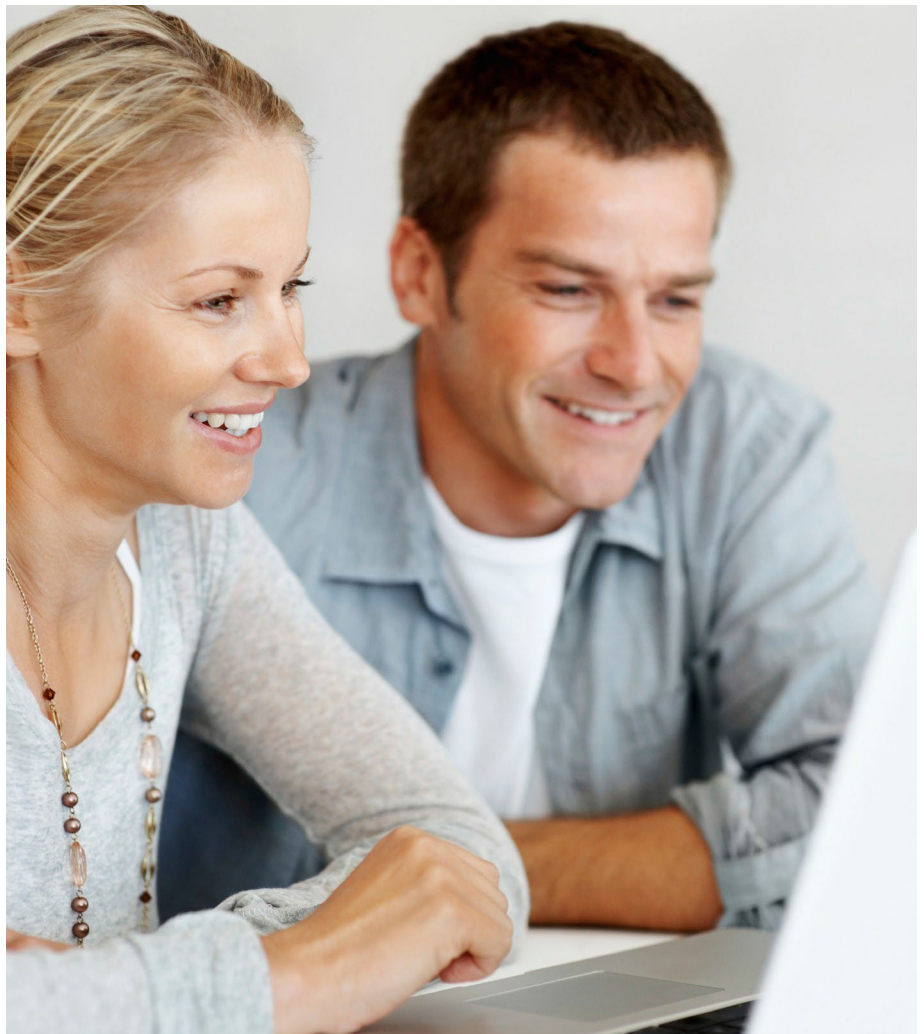
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## FINANCIAL DESIGN CENTER OVERVIEW

This training guide will provide an overview of the Financial Design Center. The Financial Design Center is a personal financial website that will provide you with a consolidated view of your financial information.



# HOME PAGE AND SETTINGS

Go to [wealth.emaplan.com/ema/Default.aspx?ema/ria/signaturefd](http://wealth.emaplan.com/ema/Default.aspx?ema/ria/signaturefd). There are many features, such as the Organizer, Reports and Vault (an online safe-deposit box that stores digital copies of valuable personal documents such as wills, trusts, passport information and photos).

**Note:** You will need to establish three security questions the first time you log on. Each subsequent log on will prompt you for an answer to one of the questions unless the following box is checked:

Don't ask me again from this device

## Home Page

At the top left-hand side of the **Home** page, click **Help** and select **Take a Tour of this Page** for help navigating the site.

The screenshot shows the SIGNATURE FID Home page. The navigation bar includes Home, Organizer, Spending, Investments, Vault, Reports, Help, Settings, and Sign Out. The user is identified as George P. and Amanda Burdell. The dashboard features several key metrics: Accounts (with a '+ Add Account' button), Cash (\$1,213,733), Net Worth (\$9,732,344 as of today, up \$98,312 this month and \$1.7M year to date), Investments (\$6,366,846 as of today), and Spending (\$0 Income, -\$550 Expenses, -\$550 Net). There is also an Overall Budget section showing (\$10) of \$1,900. A list of accounts and credit cards is visible on the left side.

## Settings

Click **Settings** to set alerts, security and privacy settings.

The screenshot shows the SIGNATURE FID Settings page. The navigation bar includes Home, Organizer, Workshop, Spending, Investments, Vault, Reports, Help, Settings, and Sign Out. The 'Settings' menu is expanded, showing Alerts, Security, and Privacy. The 'Change Password' section has fields for Old Password, New Password, and Verify Password, with a 'Save' button. The 'Change Security Question' section has instructions and fields for Security Question, Answer, and Verify Answer, repeated three times.

## Review your settings

### Privacy

The **Privacy** tab allows control of the advisor's access to your spending data.

### Spending Permissions

**None:** The advisor will not have access to any spending data.

**Limited:** The advisor will have limited access to spending details and can view only the categories regarding spending and budget, not individual transactions.

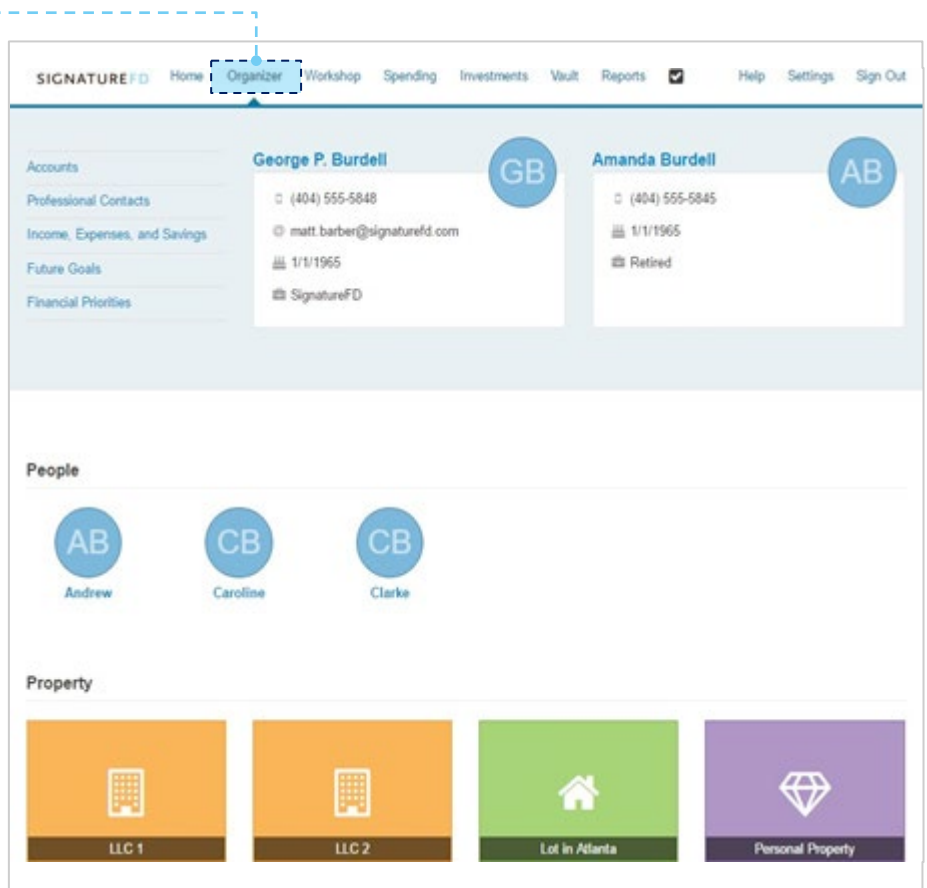
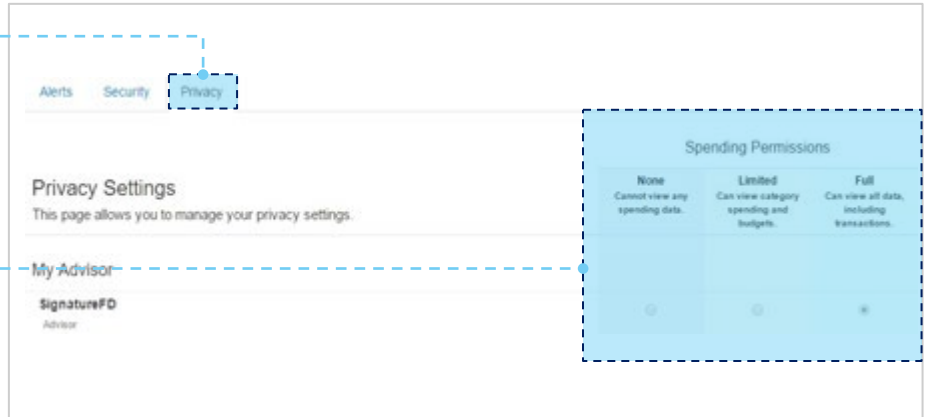
**Full access:** The advisor can view all spending and budgeting items, including transactions.

### Organizer

The **Organizer** is a place to enter your data such as accounts, property, income and expenses.

We have already input most of your data, but we would like you to input outside accounts so that we have access to up-to-date information. This will allow you to view your entire financial picture whenever you want to.

It also allows your financial advisor to run reports based on your most current financial information.



# ACCOUNTS AND SPENDING

## Accounts

To add accounts to the Organizer, click **Accounts**.

## Add

Click the **Add** button to search for a specific institution.

## Search

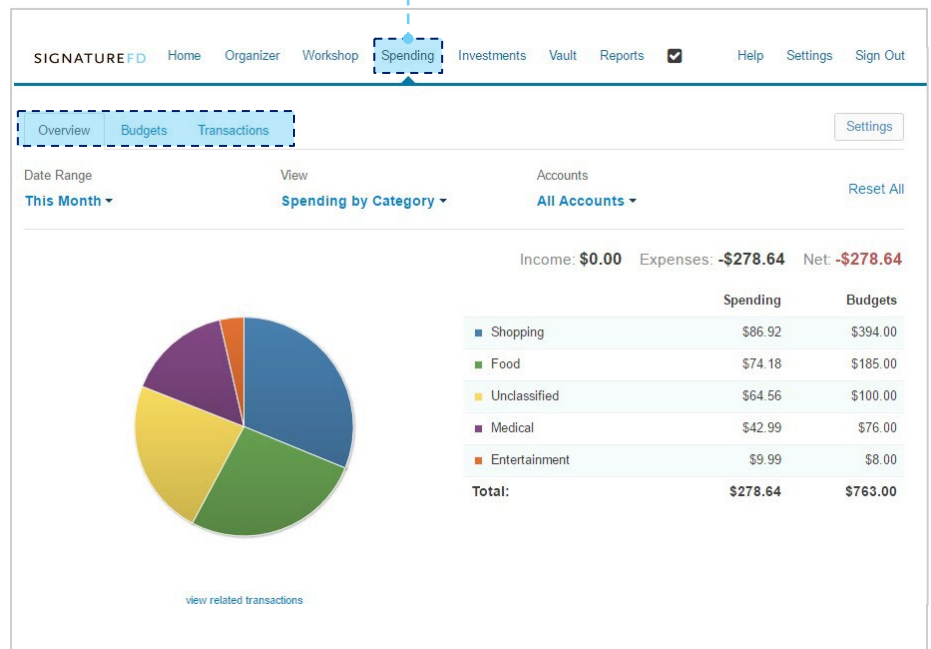
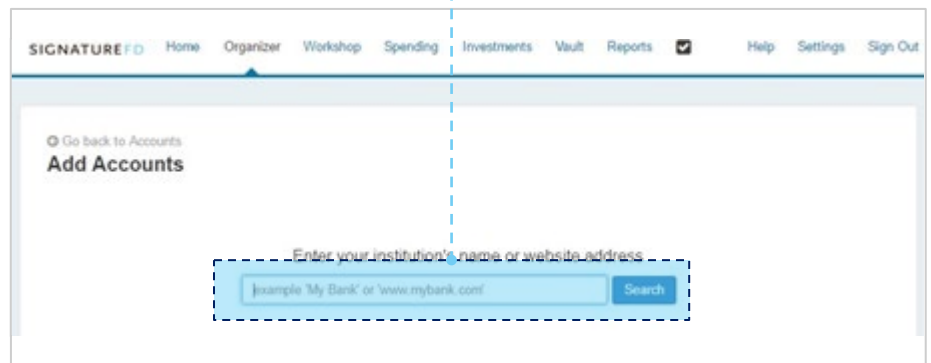
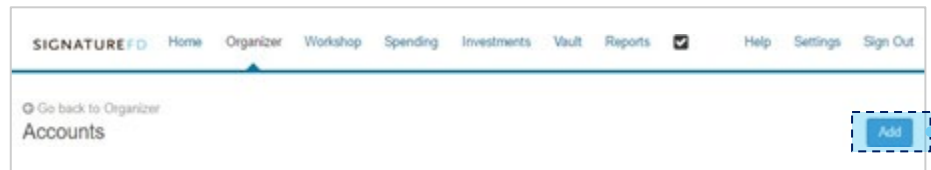
Type in the name of the institution where you have accounts, and click **Search**.

**Note:** There must be an online account set up at the institution in order to connect it and bring the current value into the Organizer. If you do not see your institution, let us know and we can request that it be added to the system.

## Spending

The Spending tab allows you to track your spending habits and build a custom budget.

- The **Overview** tab provides a pie chart based on recent transactions imported from aggregated accounts.
- The **Budgets** window is a snapshot that allows you to monitor if you are on track with your monthly budget.
- The **Transactions** tab shows transactions pulled in from connected accounts.



# INVESTMENTS AND ACCOUNT DETAILS

## Investments

The **Investments** tab allows you to view up-to-date market information based on connected investments.

The screenshot shows the 'SIGNATURE FID' Investments page. The 'Investments' tab is highlighted in the top navigation bar. Below the navigation, there are tabs for 'Summary', 'Allocation', 'Analysis', and 'Transactions'. The 'Summary' tab is active, displaying account information and a 'Balance History' chart. The current value is \$2,666,972.93, with a today's change of +\$1,759.28 (0.07%). A table lists various accounts with their positions, holdings, current values, and today's changes.

Account	Positions As Of	Holdings	Current Value	Today's Change
Andrew 529 plan (-2566)	10/17/2016 11:51AM	111,468.63	\$111,468.63	
Betty 401(k) (-405B)	10/17/2016 11:51AM	239,776.25	\$239,776.25	
Betty Investment (-1001)	10/17/2016 11:51AM	106,049.97	\$106,049.97	-\$292.58 0.28%
Betty IRA (-1004)	10/17/2016 11:51AM	125,621.80	\$125,621.80	-\$236.25 0.19%
Betty Roth (-1002)	10/17/2016 11:51AM	10,121.33	\$10,121.33	
Bob 401(k) (-40TB)	10/17/2016 11:51AM	273,781.02	\$273,781.02	
Bob IRA Rollover (-6620)	10/17/2016 11:51AM	165,474.35	\$165,474.35	-\$897.75 0.55%
Bob Roth (-6607)	10/17/2016 11:51AM	55,666.33	\$55,666.33	

## Investments

Click on the account name under Accounts to see a holdings breakdown of any given account. You can also click on specific holdings to view additional information on each investment.

The screenshot shows the 'SIGNATURE FID' Investments page with the 'Accounts' tab selected. The 'Bob 401(k) (-40TB)' account is highlighted. The 'Summary' tab is active, displaying account information and a 'Balance History' chart. The current value is \$273,781.02. A table lists the holdings for this account, including symbols, descriptions, quantities, prices, values, and today's changes.

Symbol	Description	Quantity	Price	Value	Today's Change
BAA-0544	PMCO Total Return Fnd Int	9,897.84	\$12.13	\$120,017.07	\$2,487.50
BAA-3524	PMCO Income Fund Int	4,398.33	\$13.64	\$60,015.27	\$1,233.75
BAA-6722	Vanguard Emr Mkts Stk Int Fd Adm	5,045.14	\$8.85	\$44,647.19	\$763.74
BAA-9889	Vanguard Total Int S&P Index Fd Adm	5,106.27	\$9.33	\$47,664.12	\$43,786.93
BAA-1899	American Funds Nvr Prpchr RE	94.83	\$15.16	\$1,437.37	\$1,410.00

## Vault

The Vault provides secure storage for valuable personal documents (wills, trusts, insurance documents, passports, etc.) in electronic format.

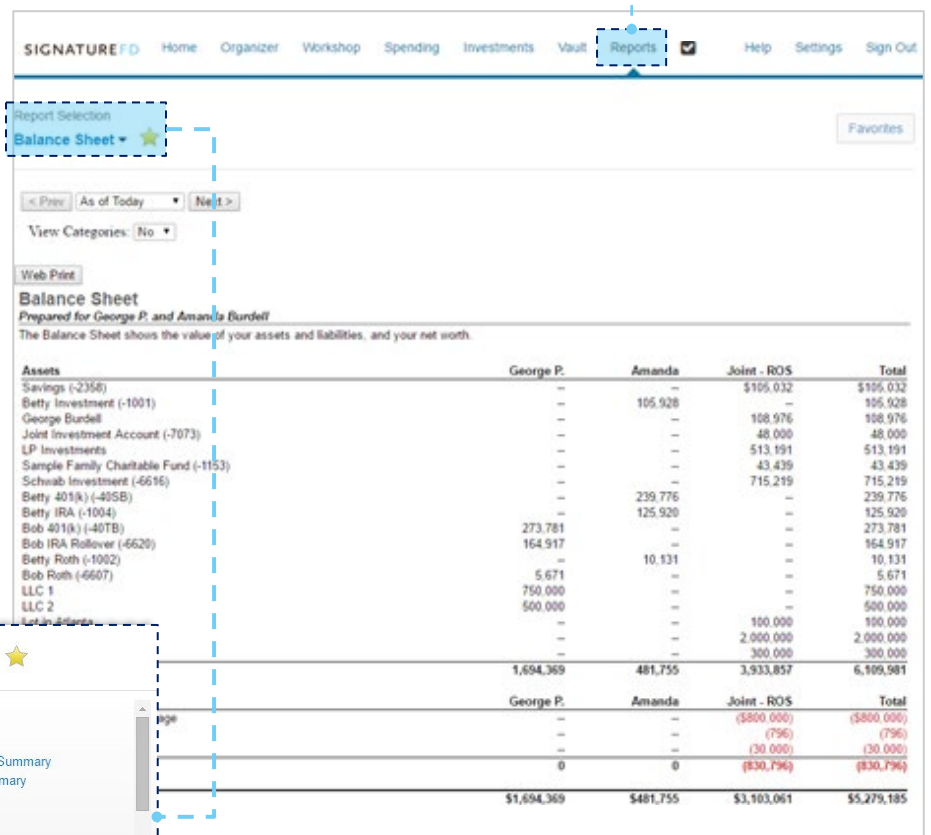
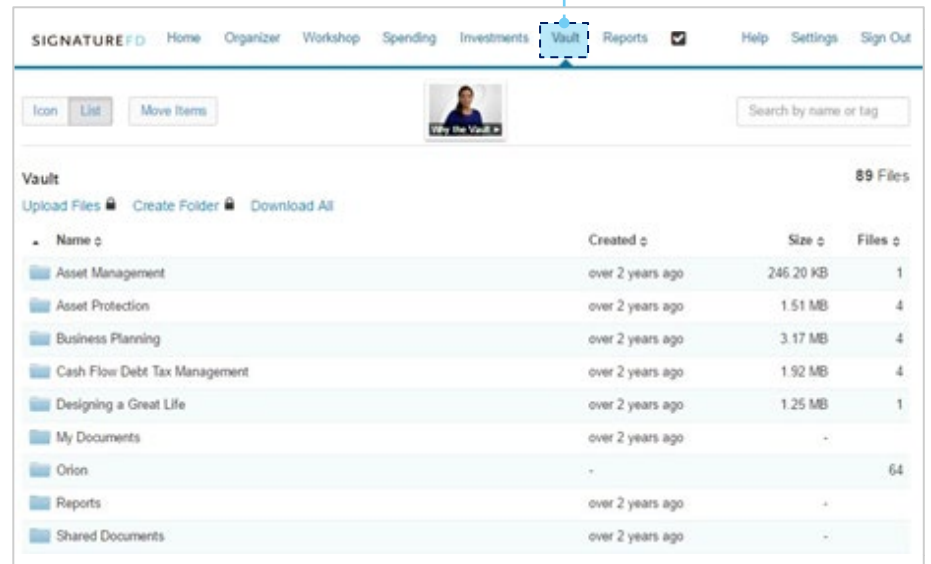
- You can upload documents into the **Shared Documents** folder, allowing the advisor to also view the contents.
- You can upload documents into the **My Documents** folder, which is a private folder where only you can access the contents.
- We will upload documents that we have access to, such as tax returns and estate planning documents, into the appropriate folders.
- The **Orion** folder will include your performance reports and tax documents.

**Note:** The Vault allows files with the following extensions: .aifc, .aiff, .aif, .au, .avi, .bmp, .doc, .gif, .jpg, .jpeg, .mov, .mp3, .mpeg, .mpg, .pdf, .png, .ppt, .ps, .rtf, .snd, .swf, .tax, .tif, .tiff, .txt, .wav, .wma, .wmv, .wps, .xls and xml.

## Reports

The **Reports** tab provides a series of statements about your financial situation, with all data from linked accounts updated daily.

To view a report, simply choose from the drop-down list located under **Report Selection**.



## Protection

The **Protection** tab provides you with a summary of your insurance, which includes your life, disability, long-term-care, and property and casualty insurance. When you click on this box, you can see information about your policies.

Policy Name	Value	Advisor
Andrew UTMA (-1211)	\$16,712	Orion Advisor Services
Ardent	\$122,218	Orion Advisor Services
Atlanta Property Group	\$165,721	Orion Advisor Services
Burdell Family Charita...	\$77,803	Orion Advisor Services
Caroline 529 (-2997)	\$311,492	Orion Advisor Services
Caroline UTMA (-1198)	\$17,649	Orion Advisor Services
Clarke 529 (-2556)	\$133,906	Orion Advisor Services
Clarke UTMA (-1208)	\$12,089	Orion Advisor Services
Flock	\$361,974	Orion Advisor Services

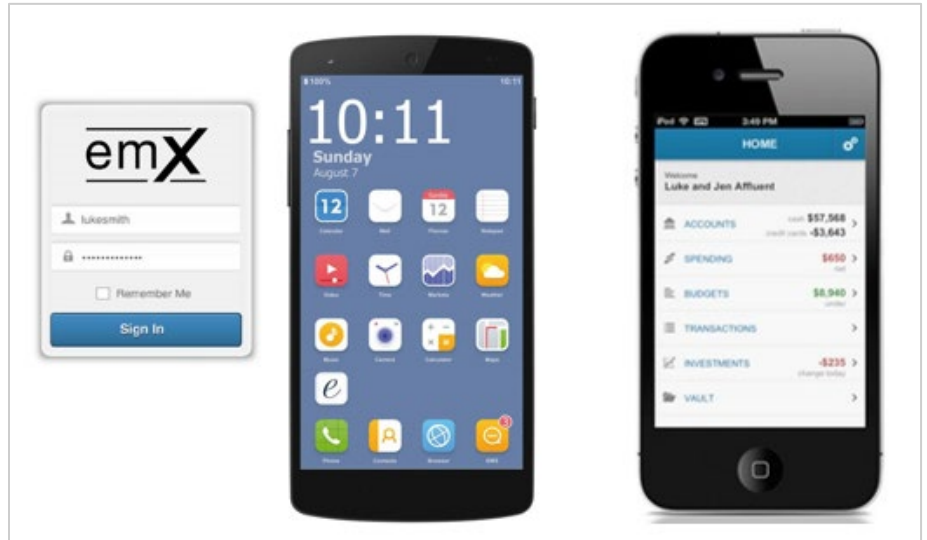
  

Policy Name	Value	Advisor
Term Life USAA	\$1,500,000	Amanda Burdell
Term Life USAA	\$1,500,000	George P. Burdell
Term Life USAA	\$1,500,000	George P. Burdell

## Mobile

The Financial Design Center is also available on your mobile devices.

- Once you've completed the self-registration process for your Personal Financial Website, you will receive a Website Registration confirmation email.
- Using your smart phone, access your email and click on the URL provided. Before logging on, add or save the link to your smart phone's Home Screen.



### Disclosures and Disclaimers

Please remember that past performance may not be indicative of future results. Different types of investments involve varying degrees of risk, and there can be no assurance that the future performance of any specific investment, investment strategy, or product (including the investments and/or investment strategies recommended or undertaken by SignatureFD, LLC), or any non-investment related content, made reference to directly or indirectly in this guide will be profitable, equal any corresponding indicated historical performance level(s), be suitable for your portfolio or individual situation, or prove successful. Due to various factors, including changing market conditions and/or applicable laws, the content may no longer be reflective of current opinions or positions. Moreover, you should not assume that any discussion or information contained in this guide serves as the receipt of, or as a substitute for, personalized investment advice from SignatureFD, LLC. To the extent that a reader has any questions regarding the applicability of any specific issue discussed above to his/her individual situation, he/she is encouraged to consult with the professional advisor of his/her choosing. SignatureFD, LLC is neither a law firm nor a certified public accounting firm and no portion of the guide content should be construed as legal or accounting advice. A copy of SignatureFD, LLC's current written disclosure statement discussing our advisory services and fees is available upon request.

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