SIGNATUREFD

1230 PEACHTREE STREET, NE
SUITE 1800
ATLANTA, GA 30309

521 E. MOREHEAD STREET
SUITE 330
CHARLOTTE, NC 28202

(404) 253-7600
WWW.SIGNATUREFD.COM

FINANCIAL DESIGN CENTER OVERVIEW

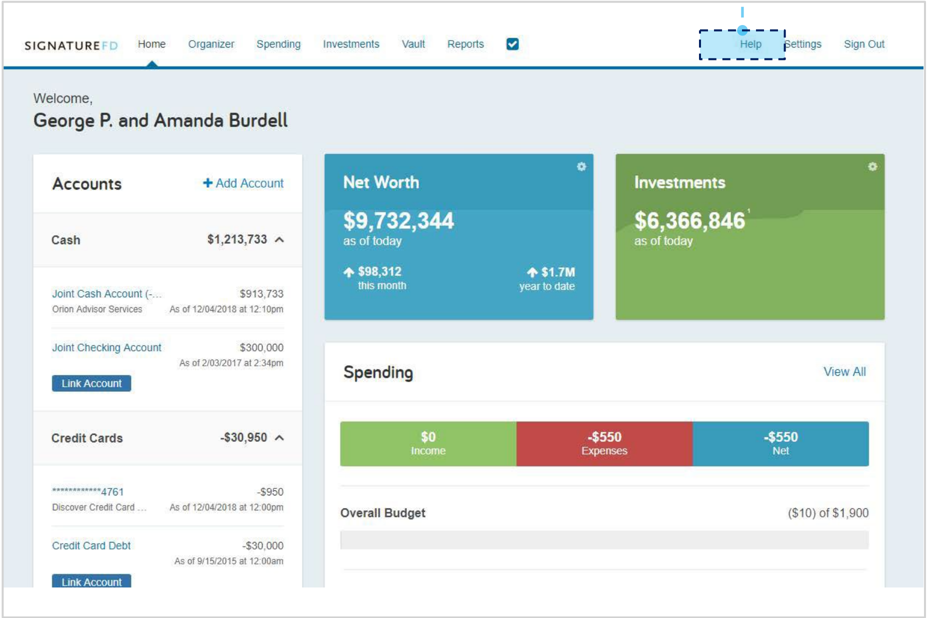
This training guide will provide an overview of the Financial Design Center. The Financial Design Center is a personal financial website that will provide you with a consolidated view of your financial information.

HOME PAGE AND SETTINGS

Go to wealth.emaplan.com/ema/Default.aspx?ema/ria/signaturefd. 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

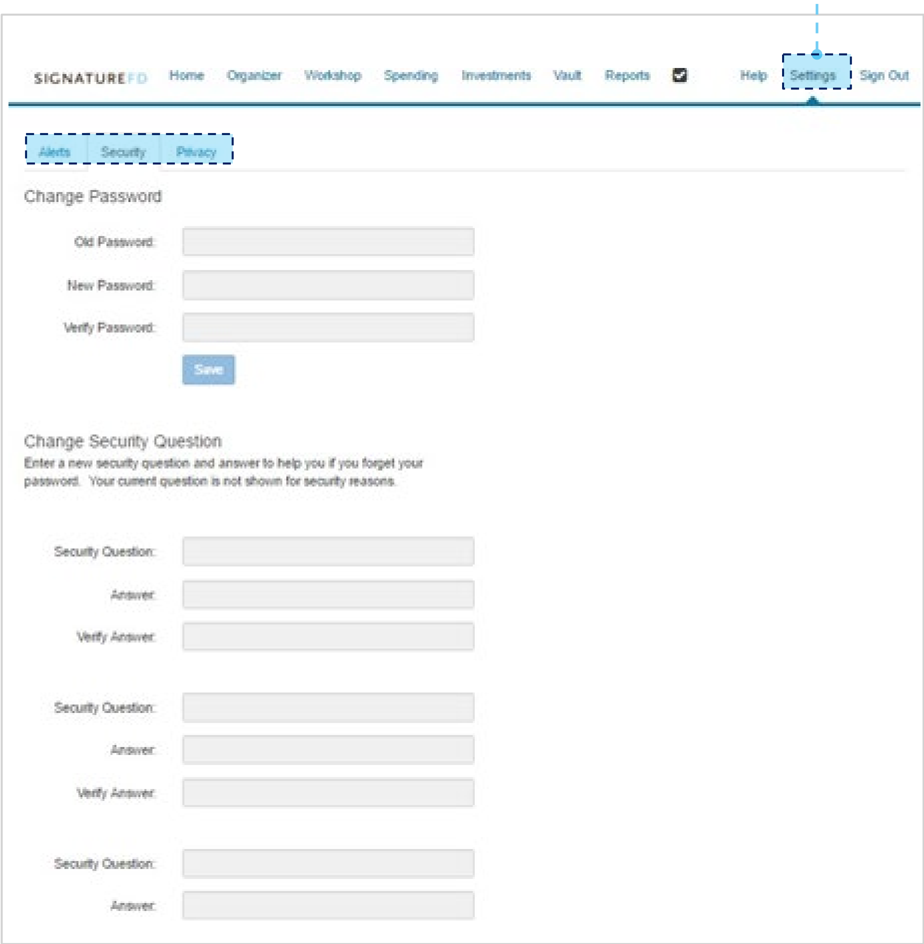


Home Page

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.

Settings

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

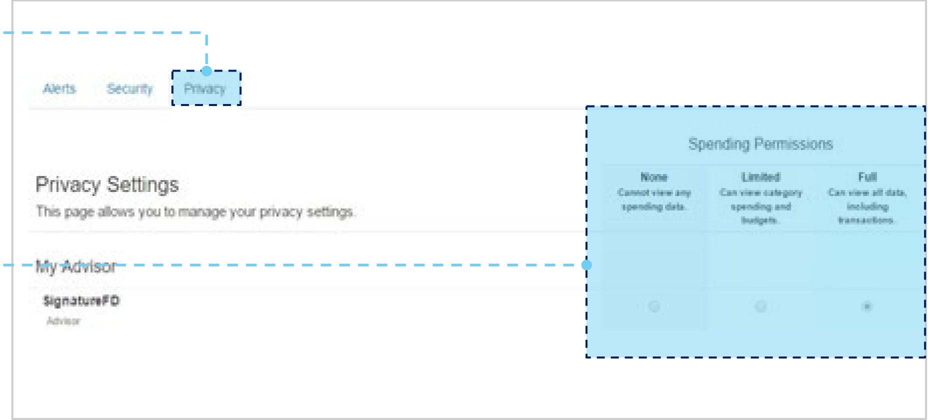


PRIVACY AND ORGANIZER

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.

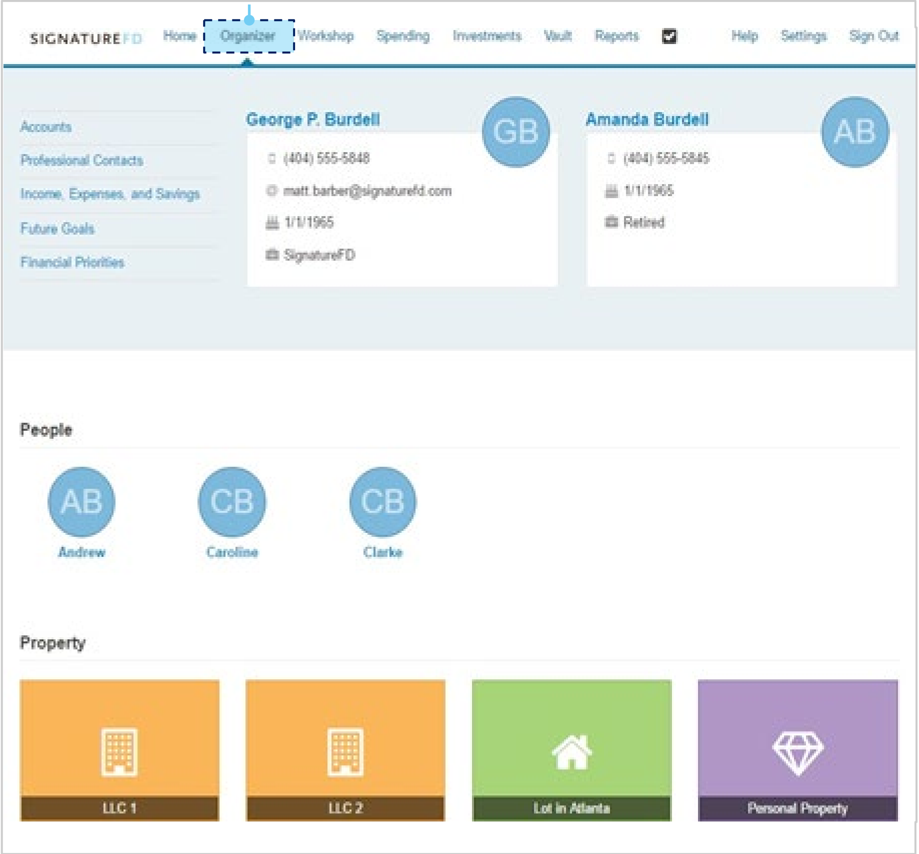
Full access: The advisor can view all spending and budgeting items, Including transactions.

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

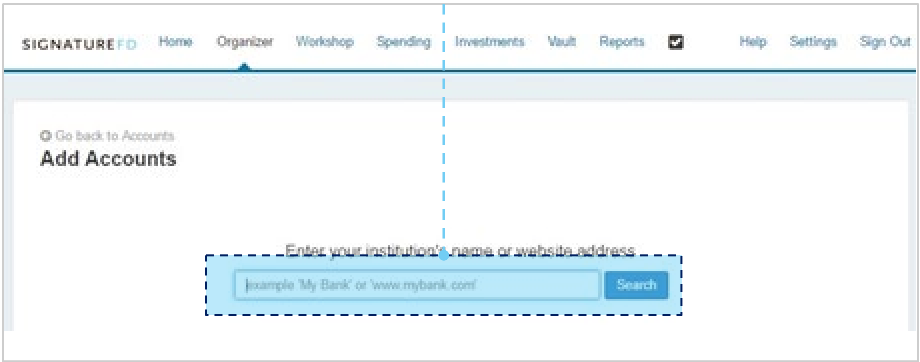
To add accounts to the Organizer, click **Accounts**.

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.

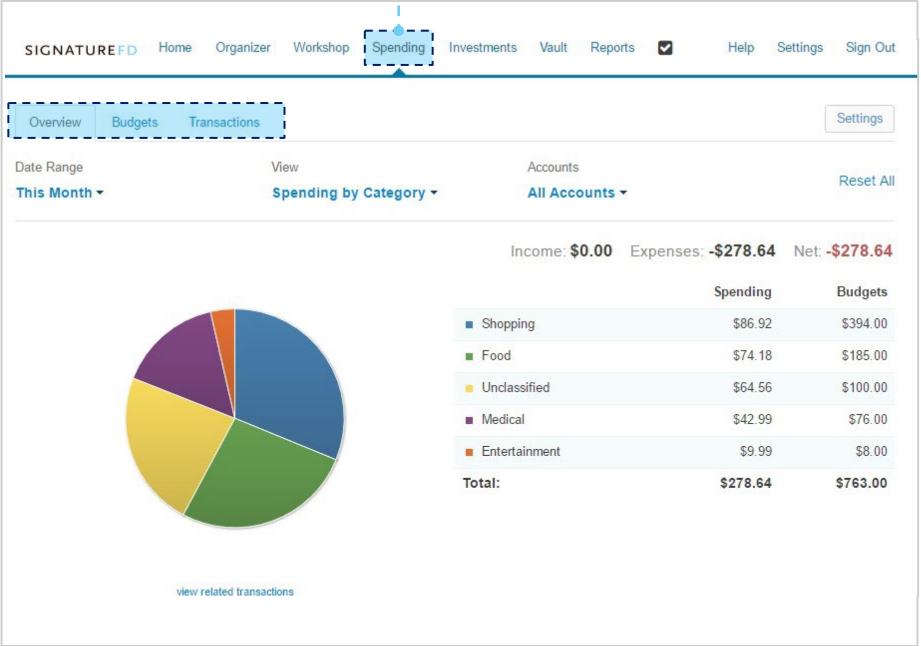
Spending

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

a. The **Overview** tab provides a pie chart based on recent transactions imported from aggregated accounts.

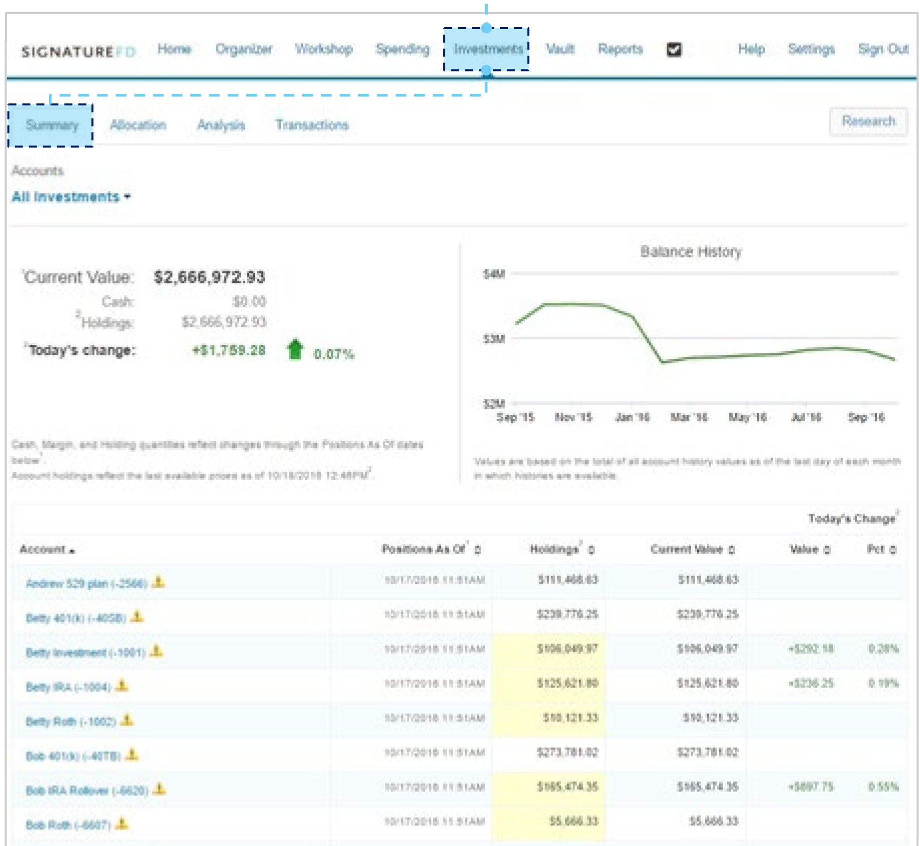
b. The **Budgets** window is a snapshot that allows you to monitor if you are on track with your monthly budget.

c. The **Transactions** tab shows transactions pulled in from connected accounts.



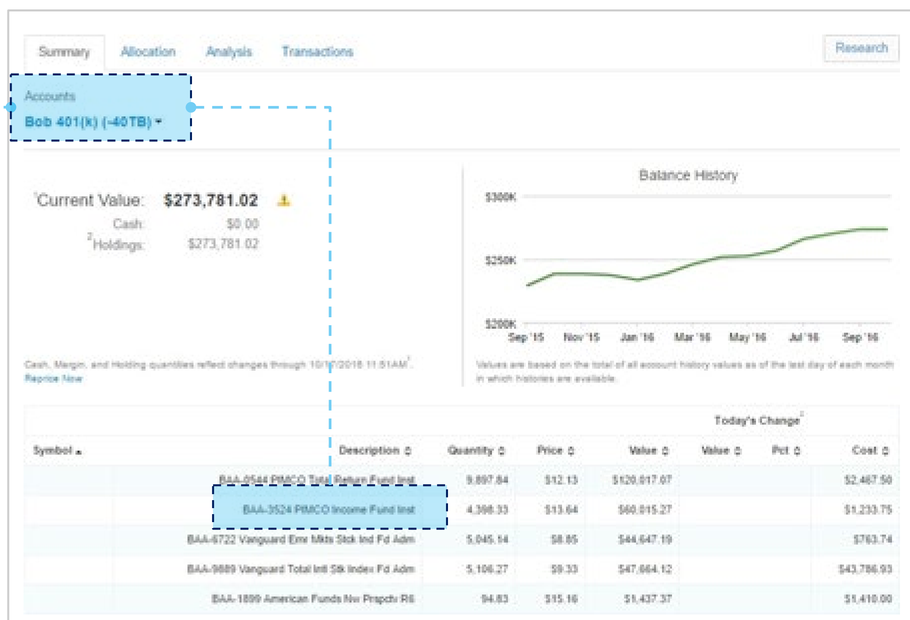
Investments

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



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.



Vault

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

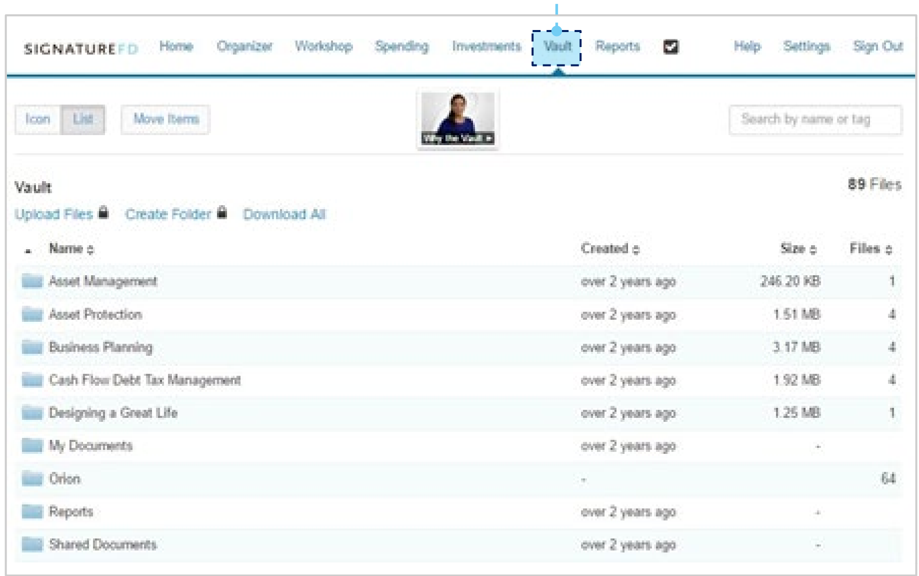
a. You can upload documents into the **Shared Documents** folder, allowing the advisor to also view the contents.

b. You can upload documents into the **My Documents** folder, which is a private folder where only you can access the contents.

c. We will upload documents that we have access to, such as tax returns and estate planning documents, into the appropriate folders.

d. The **Orion** folder will include your performance reports and tax documents.

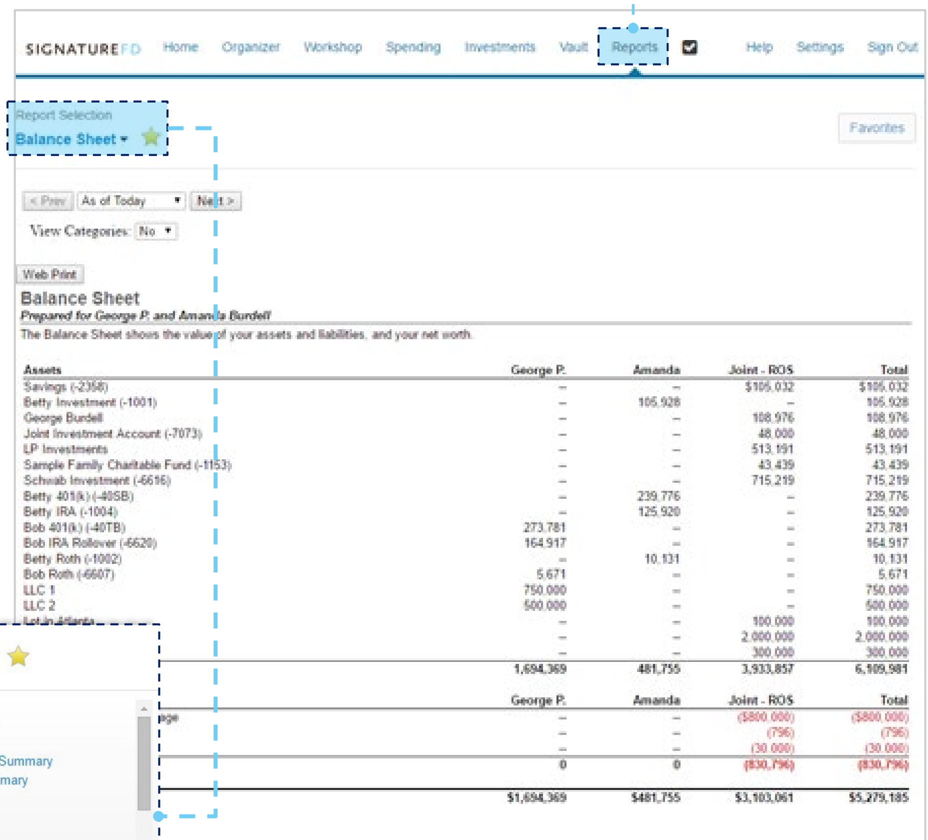
Note: The Vault allows files with the following extensions: .aifc, .aiff, .aif, .au, .avi, .bmp, .doc, .gif, .jpg, .jpeg, .mov, .mp3, .mpeg, .mpg, .pdf, .png, .ppt, .ps, .rtf, .snd, .swf, .tax, .tif, .tiff, .txt, .wav, .wma, .wmv, .wps, .xls and xml.

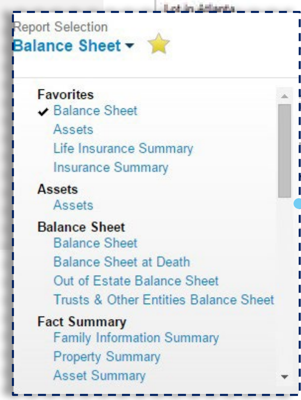


Reports

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

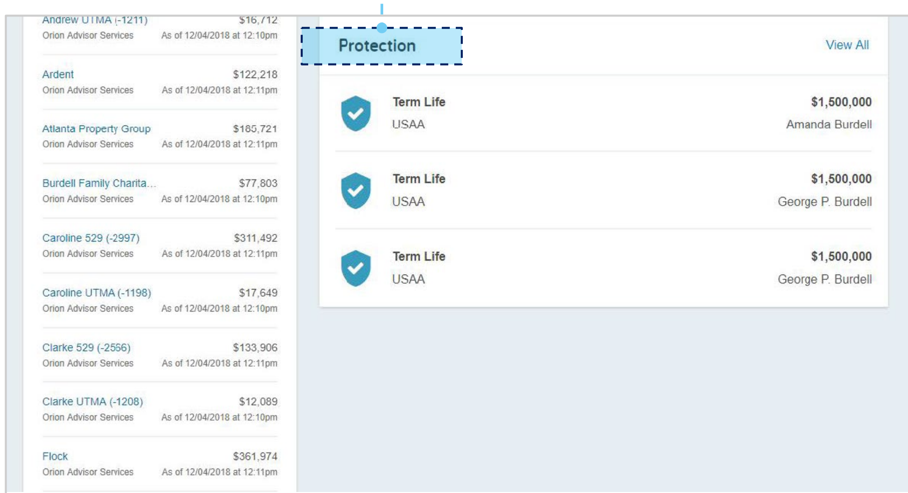
To view a report, simply choose from the drop-down list located under **Report Selection**.





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.

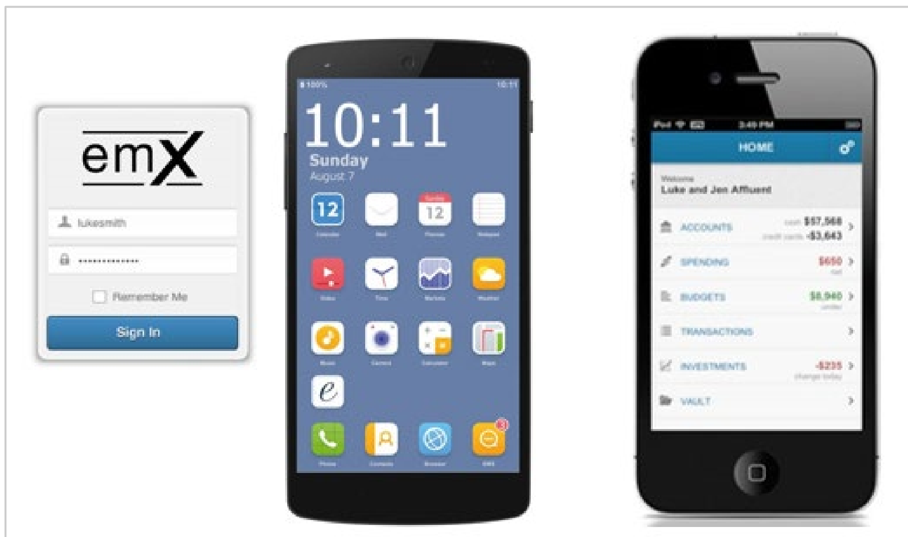


Mobile

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

a. Once you've completed the self-registration process for your Personal Financial Website, you will receive a Website Registration confirmation email.

b. 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

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