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.

Logging in for the first time.

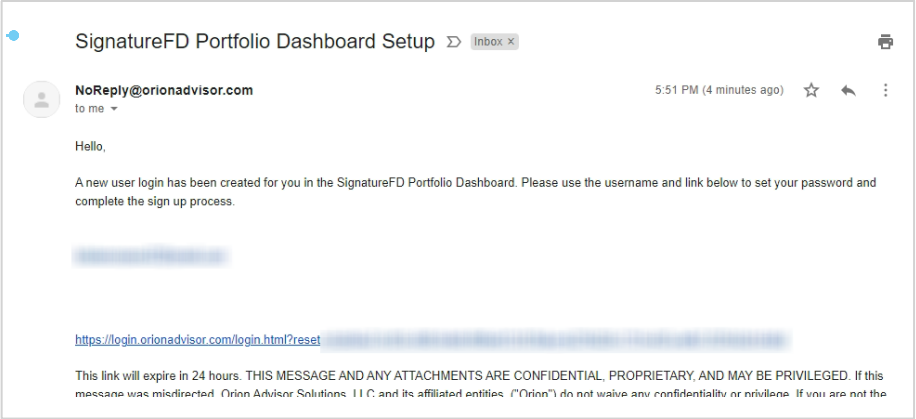
After your account has been setup by SignatureFD, you will receive further instructions via email.

Check your Inbox

Look for email subject "**SignatureFD Portfolio Dashboard Setup**" from NoReply@orionadvisor.com

This will include your username and unique url to setup your password. Open this link to proceed.

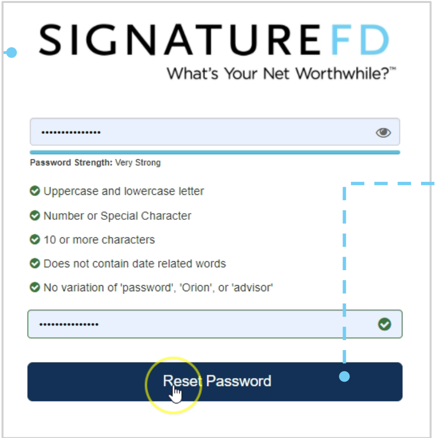
*If your link has expired, please reach out to support@signaturefd.com for assistance.



Create Password

After clicking the link, you will be prompted to enter a new password.

Please note: A password must meet the specific requirements displayed on the screen to help ensure a strong password. Each requirement will display a green checkmark when met.

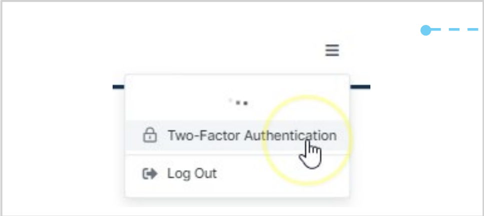


Log in to Portfolio Dashboard

Proceed with logging in with your username and new password. **Sign In** and navigate within the portfolio dashboard to your desired location.

Setup 2-Factor Authentication

You have the ability setup 2-Factor Authentication from the top right menu. Enter your mobile number if you would like text to be an additional option for authentication.



USING THE PORTFOLIO DASHBOARD

Accessing & Navigating the Portfolio Dashboard

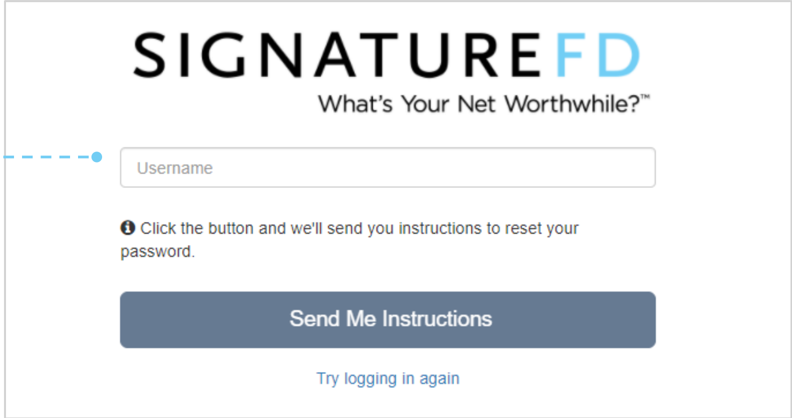
After your account is established, access your Portfolio Dashboard anytime. Go to signaturefd.com/client-login and select Portfolio Dashboard.

Forgot Password

If you forget your password, simply click **Forgot Password?** on the bottom of the login page.

On the next prompt, enter your Username *(typically your email address)* and click **Send Me Instructions**.

A reset link is sent to the email address that is associated with your household. From there, you will be able to follow the instructions for "**Create Password**" on the **Getting Started** Page.



Menu Options

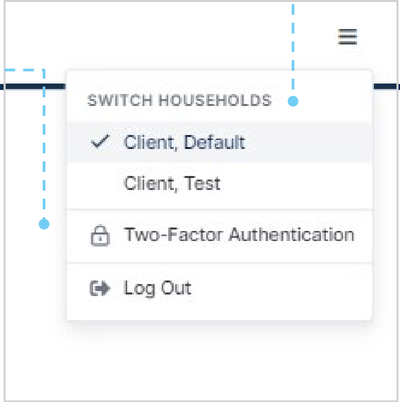
Explore menu icons and what each section contains.

Two-Factor Authentication

Manage 2-Factor Authentication settings.

Switch Households

If you have multiple households, toggle between them using the right menu.



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News Feed

As your default landing page, the **News Feed** will give you the latest announcements for important updates, new statement postings and more.

Personal Finances

Gain insights and engage in an interactive portfolio review.
*See the **Personal Finances** Summary section for more detail on available features.*

Financial Design Center

If you and your advisor are working with Financial Design Center, authenticate one time to easily bring your portals together.

Reports

Run Custom Portfolio Performance Reports, Portfolio Value Reports and Transactions Reports. Reports can be ran for a specified date range on your household or specific accounts. Download as a PDF or export to excel.
*See the **Running Reports** section for more detail.*

Document Vault

Access Portfolio Statements and 1099 Tax Reports. Custodial Statements will also reflect in this section if they are setup for auto downloading.

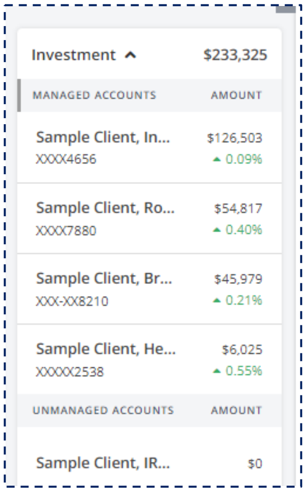
Contact support@signaturefd.com if you would like to learn more about Custodial Statement downloads.

PERSONAL FINANCES SUMMARY

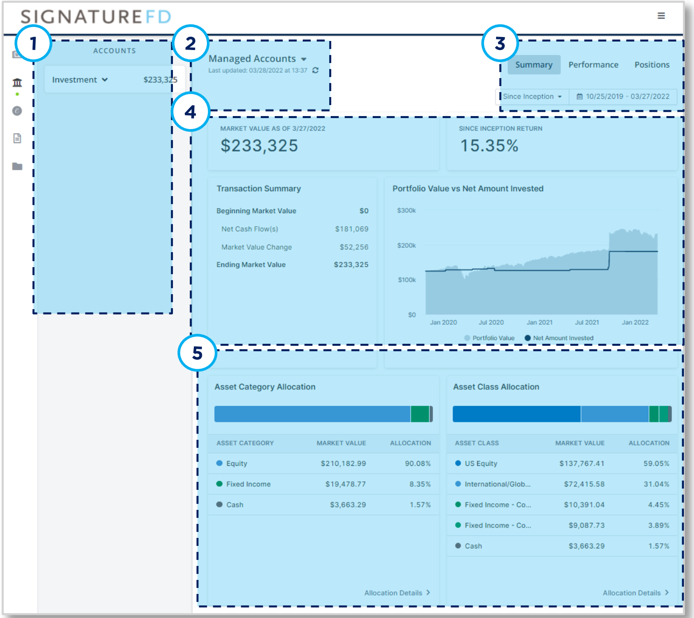
Dive deeper to further understand what own and how it's performing. Check out information for various time frames including your returns, market value, and allocations.

1 All Accounts

This section will display your total value, include BOTH managed and unmanaged accounts.

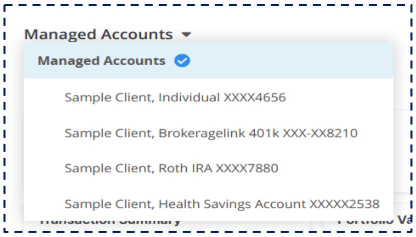


TRANSACTION HISTORY
We recommend using the **Reports** section to run a custom report for all accounts and a desired date range to review transaction history.



2 Managed Accounts

By default, the metrics in this section and those underneath are based on all of your **Managed Accounts** only.



Summary performance and allocation information are about your **managed** portfolio.

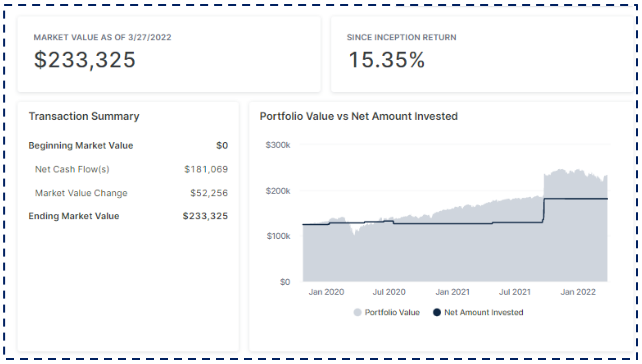
3 Date Toggle and Additional Detail Tabs

Use **Summary**, **Performance**, and **Positions** tabs to see additional available details.

Toggle the time period to see more detail over multiple periods such as Year to Date, Quarter to Date, 1 Year, Since Inception or Custom.

The date toggle in this section will change all summary fields to that period.

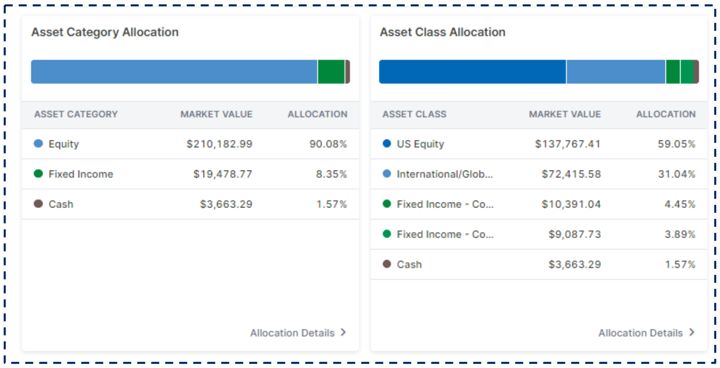
4 Visual Summaries



Visual summary based on selected date period. Items include:

Market Value
Return
Transaction Summary
Portfolio Value vs Net Amount Invested

5 Allocation Details



Click into these sections for more detail on **Asset Category Allocation** and **Asset Class Allocation.**

RUNNING REPORTS

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.

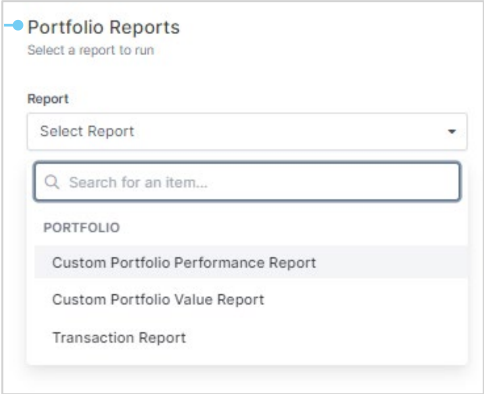
Select a Report to Run

A few options are:

Custom Portfolio Performance Report
See performance information for your household or a specific account. See document "Understanding Your Portfolio Performance Report" provides a more detailed explanation of the information presented on the Custom Portfolio Performance Report.

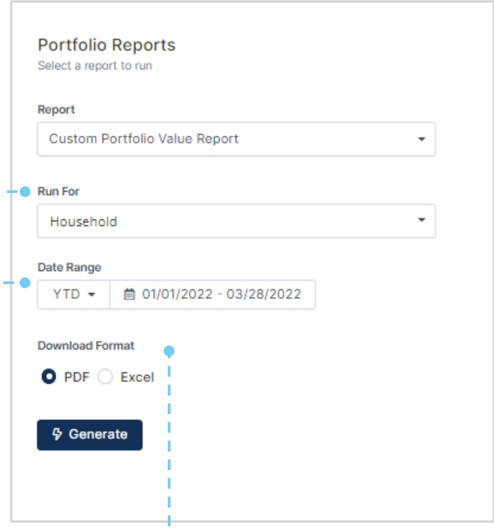
Custom Portfolio Value Report
See portfolio value and positions for your household or a specific account.

Transaction Report
Get a list of transaction for your household or a specific account for a date range.



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.



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.

Download 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.