UPDATES TO YOUR PORTAL

1. Folders:

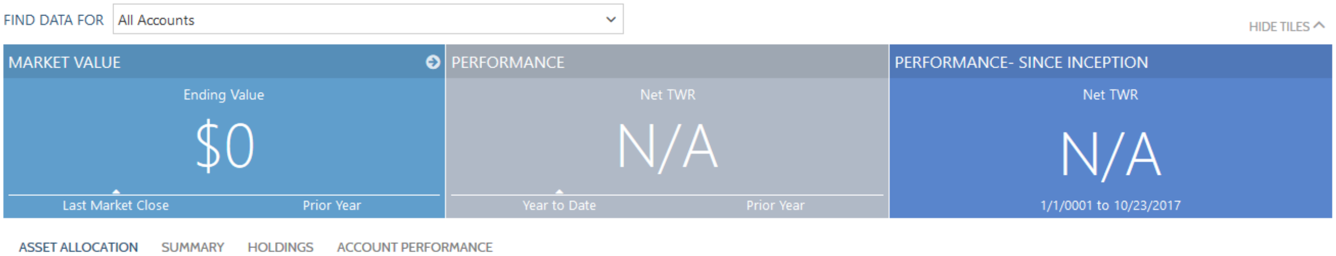
Under the ***Documents*** tab, you will notice that the labels are now listed on the left side of the documents. You can choose to view certain categories by selecting the label you want to view individually. Please note that if you have previously uploaded your own document and did not categorize it, then you will need to have the ***All*** category selected to view those documents. You will only see individual labels if there is a document categorized in your vault.

The new folders are:

- All
- Account Forms
- Account Review
- Financial Planning
- Insurance
- Miscellaneous
- Personal Documents
- Quarterly Letter
- Quarterly Reports
- RFA
- Tax Information

2. Dashboard:

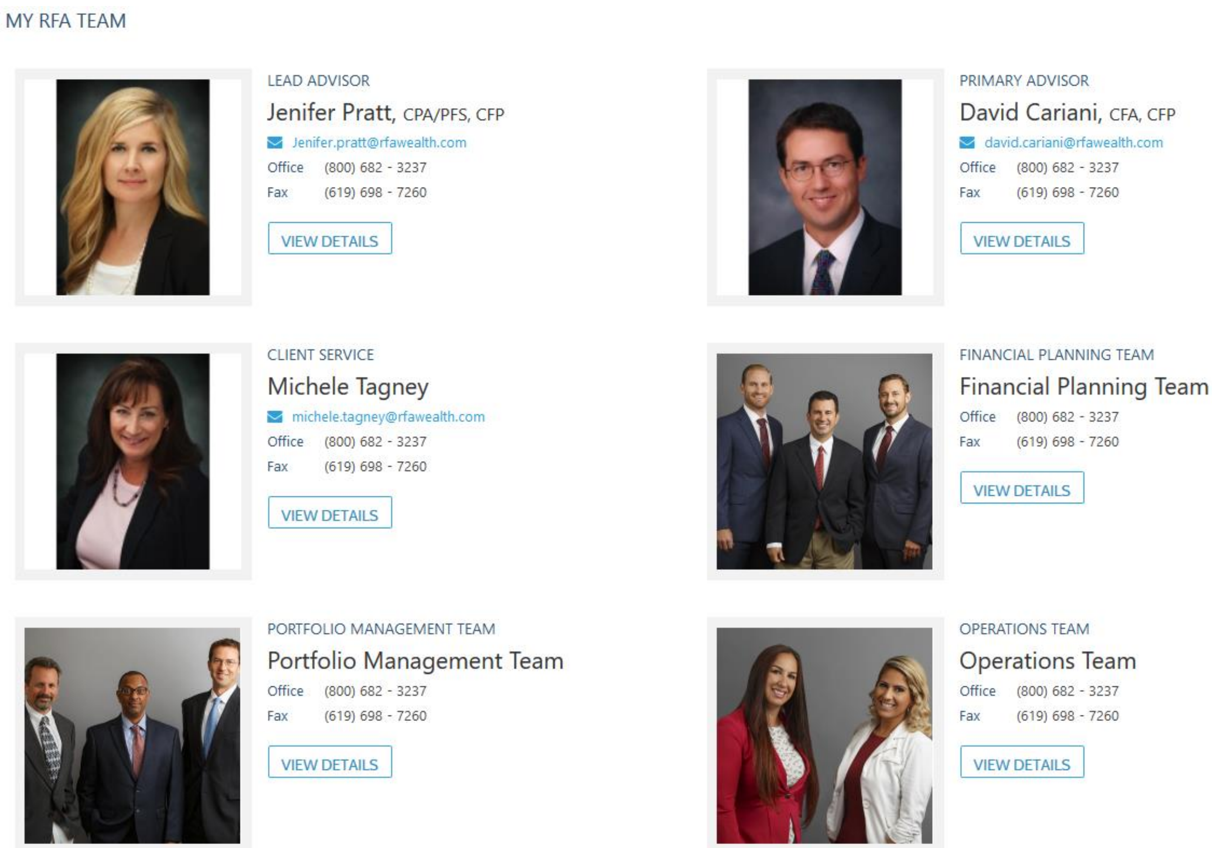
The Dashboard has been updated as well. This is the view you first see when you login into your Client Portal (see picture below). RFA has added another time period for the ***Market Value*** and ***Performance*** boxes. For ***Market Value***, it will default to the Last Market Close, but you can now click on ***Prior Year*** for last year's account value. For ***Performance,*** the default is Year-to-Date; you can now also select ***Prior Year*** to get the performance of the selected account. Please note that ***Prior Year*** is the full previous calendar year (12/31/15-12/31/16), not a rolling year.



(Client Portal Dashboard)

3. My RFA Team:

You will also see a new tab labeled ***My RFA Team***. Within that tab, you will find your specific team and all the team members who are focused on the day-to-day management of your account (see picture below). To provide open communication and transparency, each team members' contact details are listed as well. Please note, your ***Lead Advisor*** and ***Primary Advisor*** may differ from the picture below as this is just an example. The rest of the RFA team will be the same.



(My RFA Team Page)