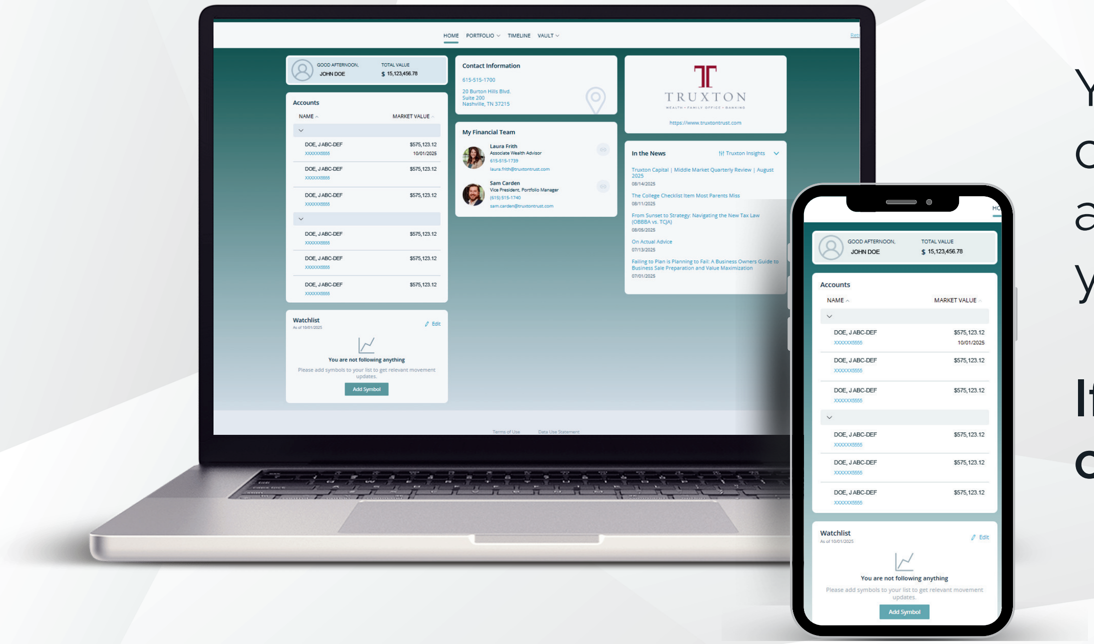
WELCOME TO YOUR PERSONAL TRUXTON FINANCIAL PORTAL



Your personalized portal keeps you connected to your financial life, your advisory team, and everything else you need for managing your wealth.

If you have any questions, please contact your personal wealth advisor.

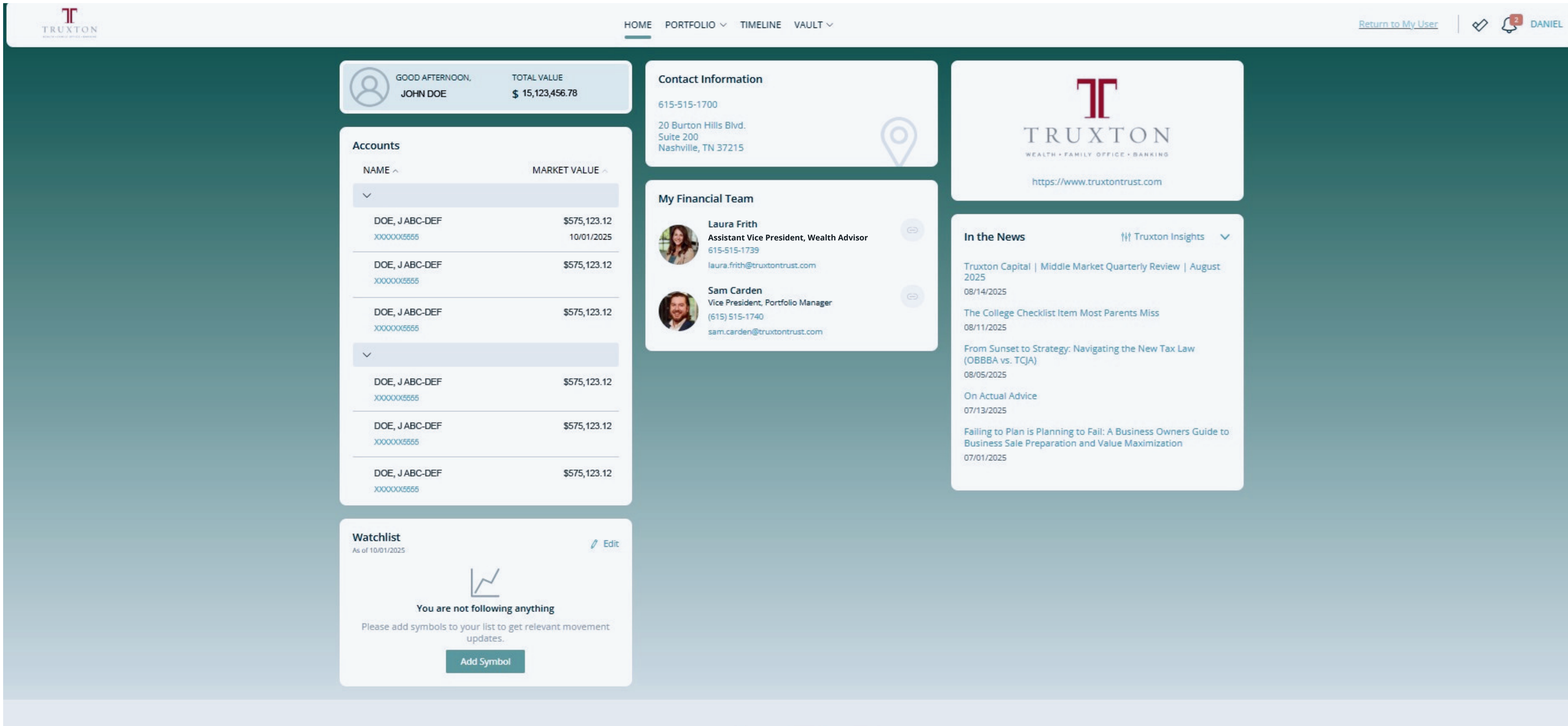
STAY CONNECTED TO YOUR FINANCIAL PICTURE

Home Page	At-a-glance view of pertinent account information
Portfolio	Dynamic view of your entire portfolio
Timeline	Curated feed of posts designed to memorialize interactions between you and your team
Vault	Easily keep track of and share your important financial and legal documents
Helpful Tips	Access mobile app instructions, login guidance, and additional resources to help you navigate the portal with confidence.

Information is presented on a trade-date basis.
Information is presented on an accrual basis illustrating income earned but not yet received.
Cash values are not separated into income and principal cash. Please reach out to your Wealth Advisor for income and principal cash balances.
Information presented should not be considered a replacement for the account's custodial statements. In the event this report and the custodial statement do not agree, the custodial statement will serve as the true books and records.

HOME PAGE

When you log in, you'll see your **personalized home page**. Then, across the top, you have quick access to the other pages of your portal.

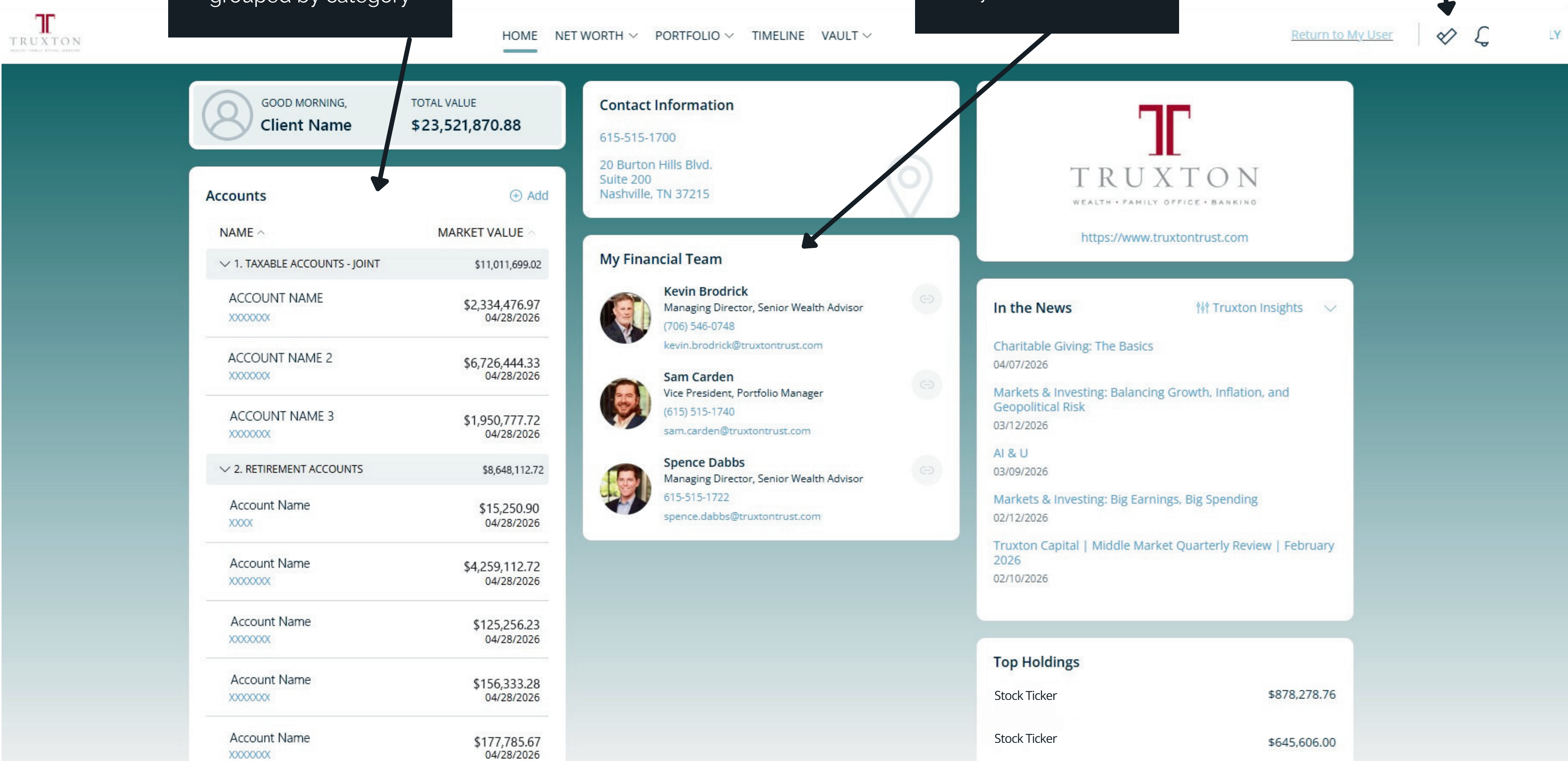


HOME PAGE

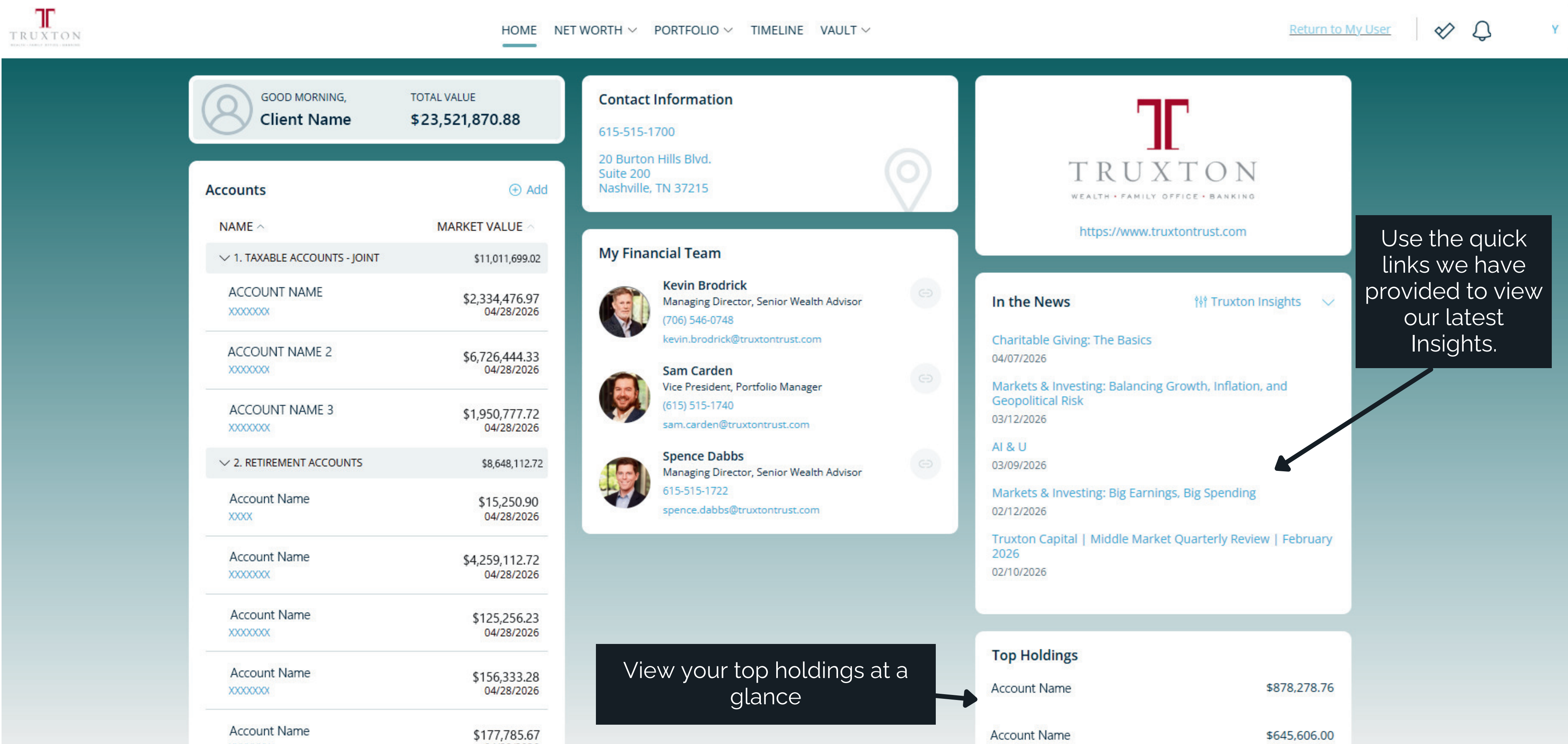
Quickly view your accounts as an aggregate total or grouped by category

Directly communicate or schedule an appointment with your financial team

View notifications from your advisor



HOME PAGE



Use the quick links we have provided to view our latest Insights.

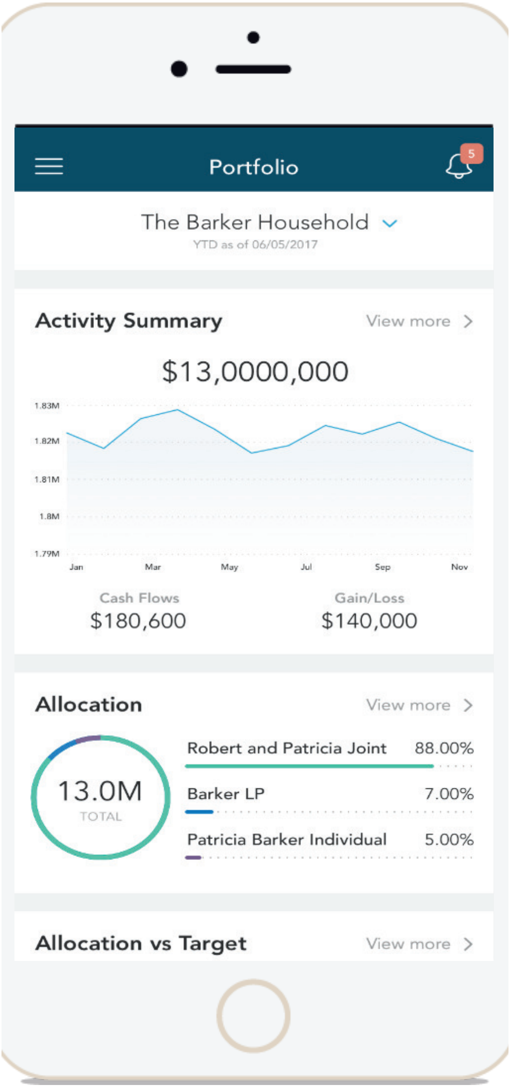
View your top holdings at a glance

PORTFOLIO

The **Portfolio** dashboard is where you can view additional details about your portfolio. The dashboard gives you a dynamic overview of your portfolio with performance cards highlighting key information about your portfolio.

To get even more detail, you can click on the title of each card. You can also use the drop-down menu to quickly switch between the different cards.

All this information is completely customizable using the filters to select specific date ranges, portfolios, or accounts.

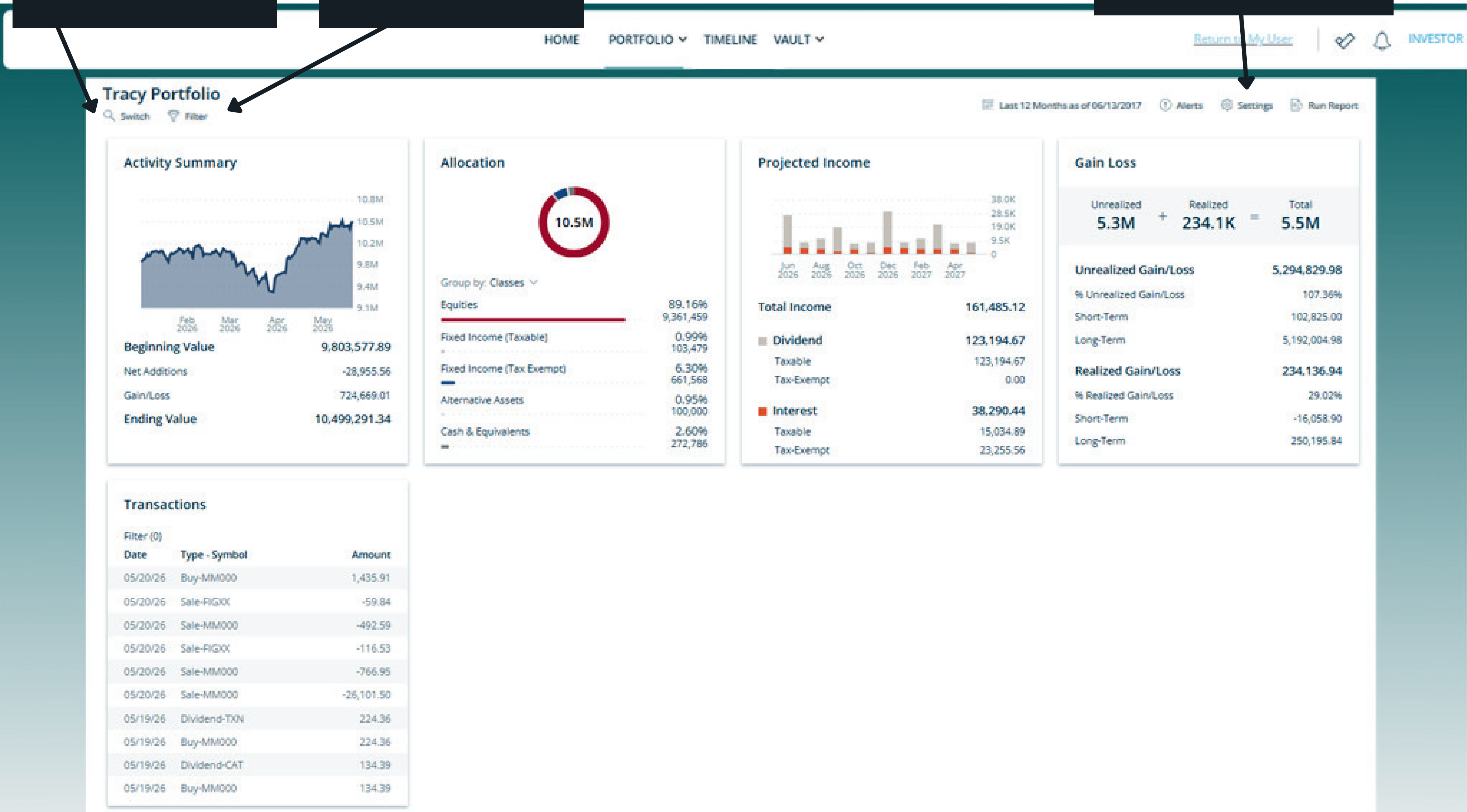


PORTFOLIO

Switch allows you to toggle between accounts

Change the portfolio displayed on the Dashboard or Filter Accounts

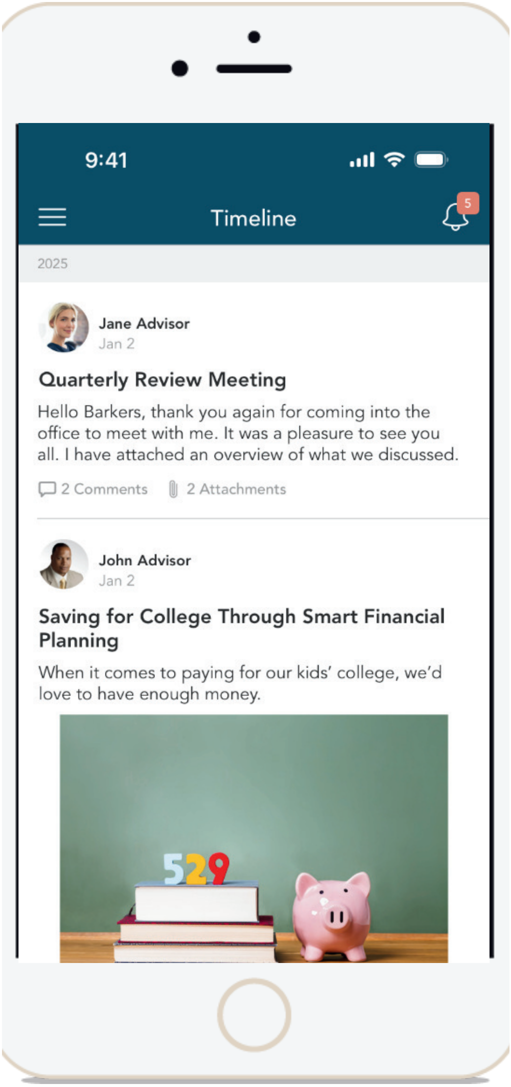
Update Supervised and Performance Return settings



RELATIONSHIP TIMELINE

The Relationship Timeline is a consolidated, curated feed of posts designed to memorialize interactions between you and your team. Countless events and activities represent your financial life journey, and Timeline is a consolidated experience designed to capture this activity.

We view this as a great communication tool between you and your financial team.



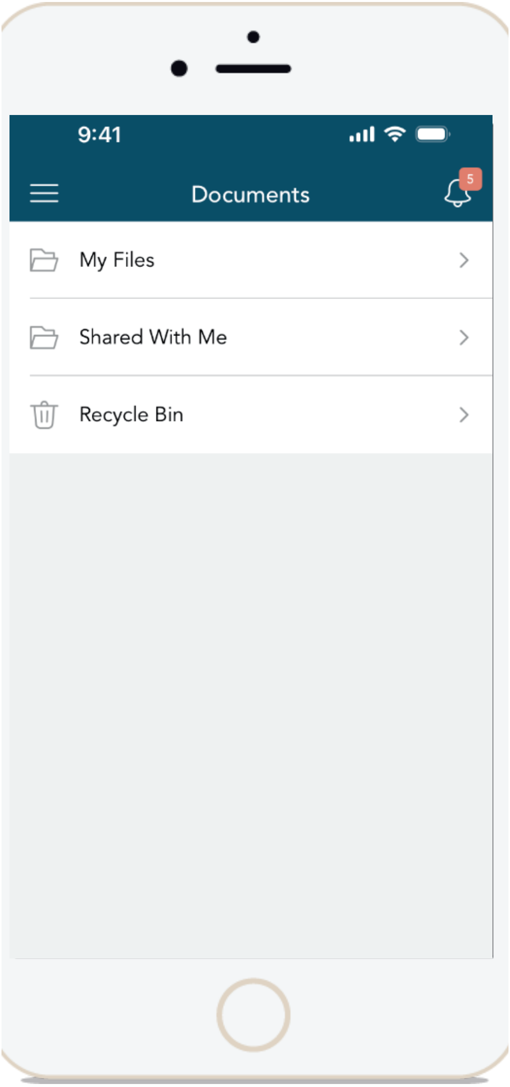
VAULT

Securely sharing and managing documents is key to working with your wealth management team. The Vault page is where you can keep track of all your important financial and legal documents.

From here, you can organize your documents into folders, drag-and-drop to upload new documents, and easily move files from one folder to another.

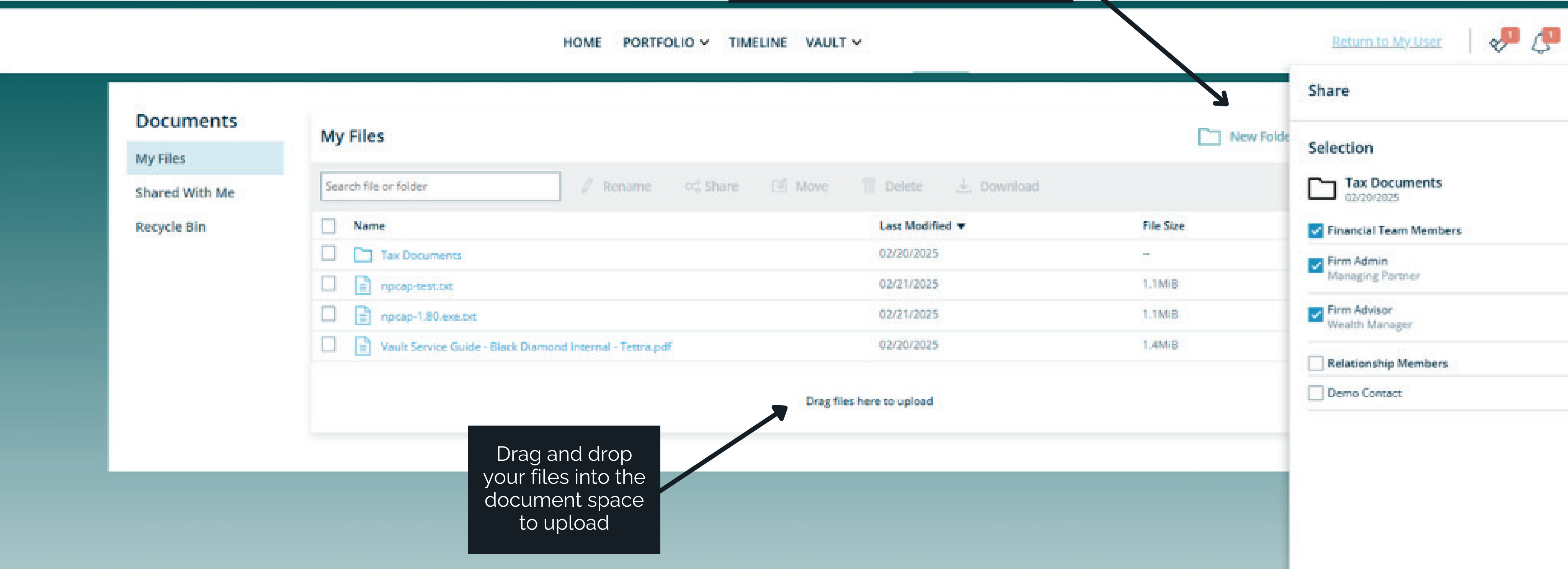
The Vault is also an area where we can share documents through the Shared Folders option.

From the Statements and Reports folders, you can view investment-focused reports created by your financial team.



VAULT

Securely store documents/files, share items with your financial team, view generated reports and custodial statements



Drag and drop your files into the document space to upload

HELPFUL TIPS

The following pages provide additional detail on several portfolio features available within your portal as well as login and mobile app download information.

These tools allow you to explore **allocation, account activity, transactions, gain/loss information**, and **projected income** in greater detail.

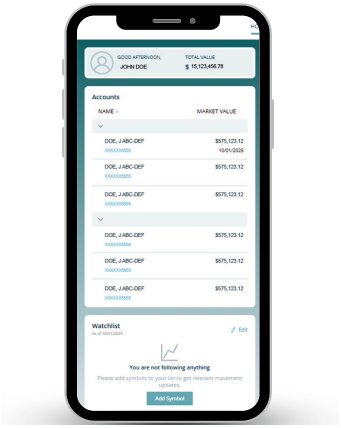
Not every client will use these features regularly, but they are available if you would like a deeper look at your financial picture.

As always, your Truxton Wealth team is happy to walk you through any section or answer questions along the way.

MOBILE APP

If you prefer to access your account on a mobile device, the Truxton Wealth Black Diamond app is available on both the Apple App Store and Google Play.

You may download the app using the links below, or by searching “Truxton Wealth” in your app store and selecting the app shown here for reference.



If you have any questions during the setup process, please contact your Truxton Wealth Advisor for assistance.

Download on the App Store

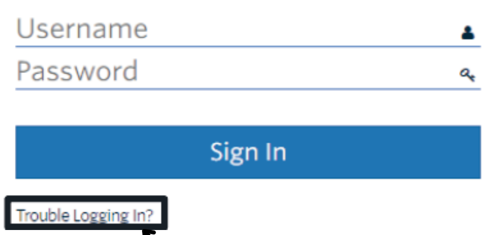
GET IT ON Google Play

LOGIN HELP

Having trouble signing in? Follow the steps below to reset your password, recover your username, or unlock your account.

1 Select "Trouble Logging In?"

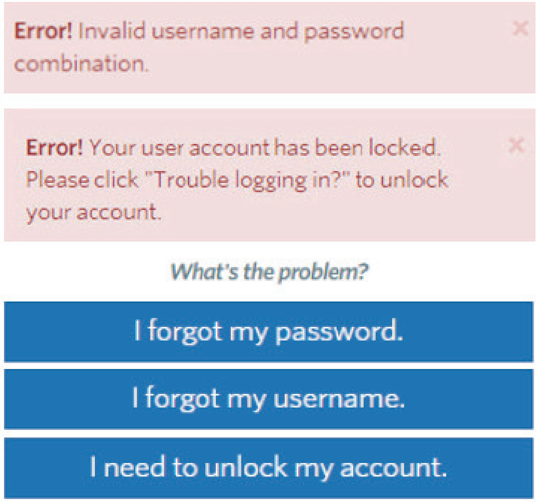
From the sign-in page, click the Trouble Logging In? Link below the username and password.



TIP: Use this link for password, username, or locked account help.

2 Choose the correct option

Select the option that matches the issues you are having.



3 Check your email

Black Diamond will send a temporary link to the email address on file. Follow the link to complete the reset.

Example email from Black Diamond

Please use the link below to reset your password:

https://bd3.bdreporting.com/Auth/Default/ResetPassword/CtEU7X0gT0StVRValXJGdA

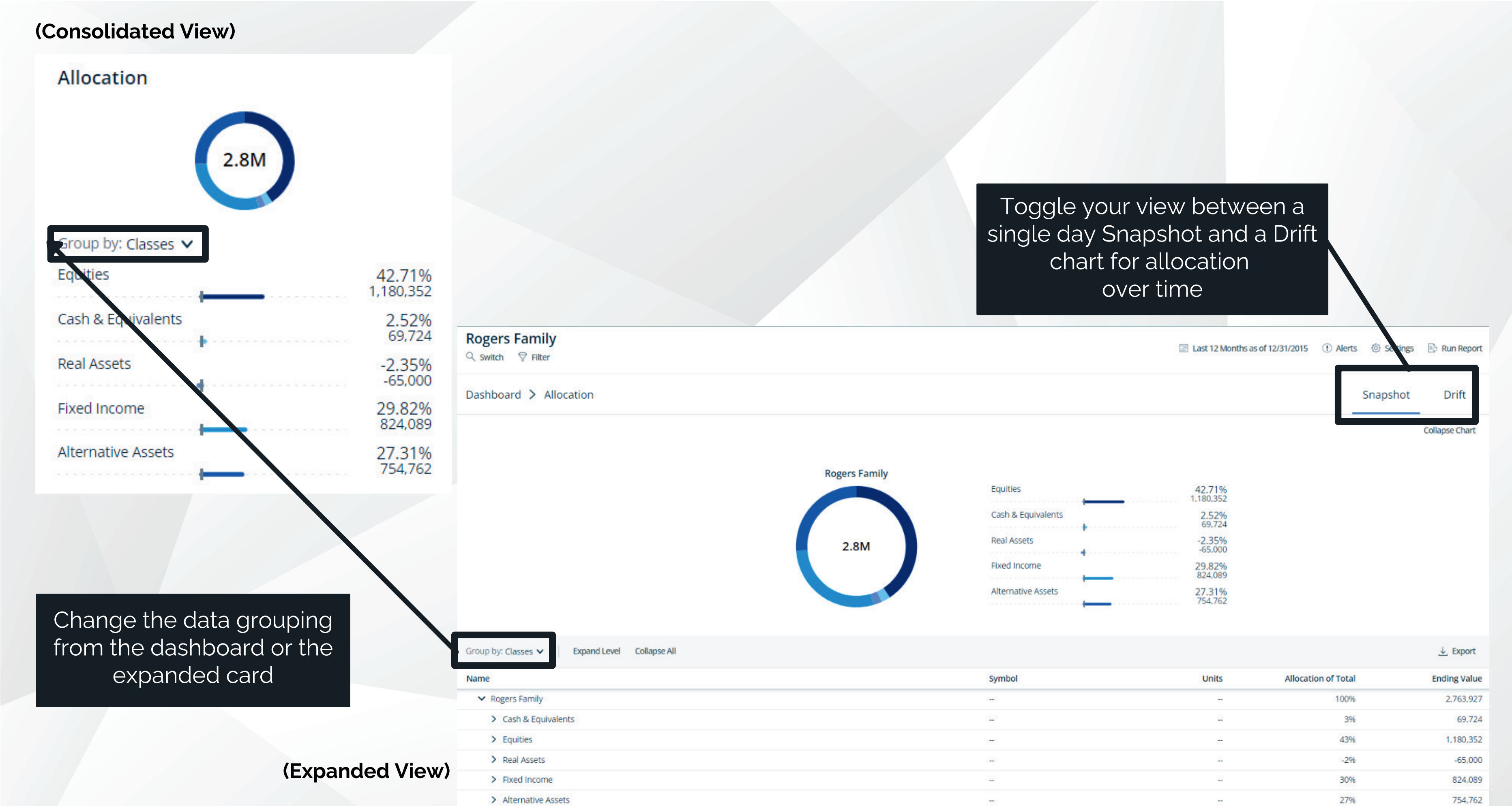
This is a temporary link and will expire in 2 days.

If you did not request this password reset, please contact your administrator.

Thanks,
Black Diamond

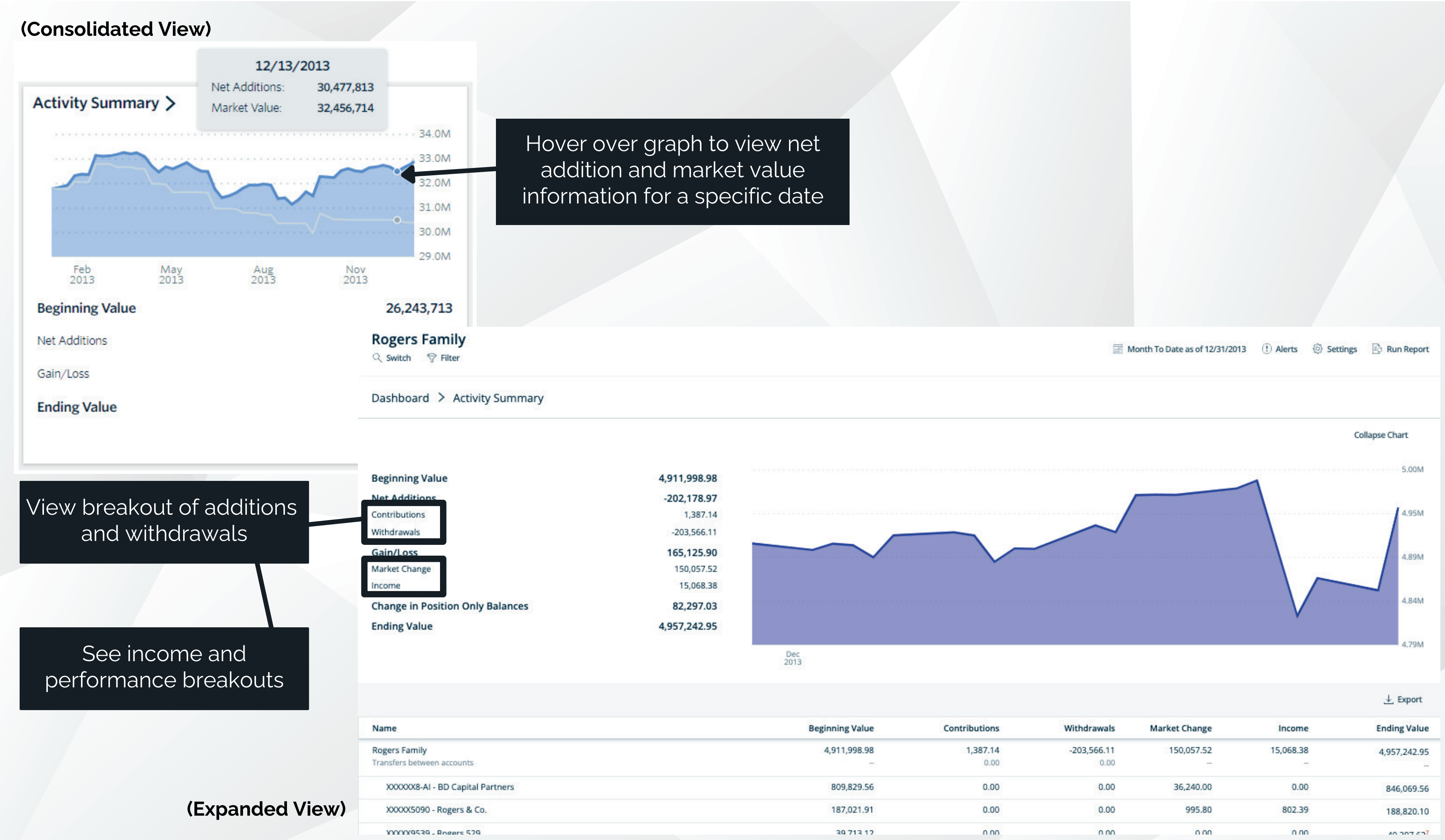
ALLOCATION

View the allocation breakdown of your portfolio.



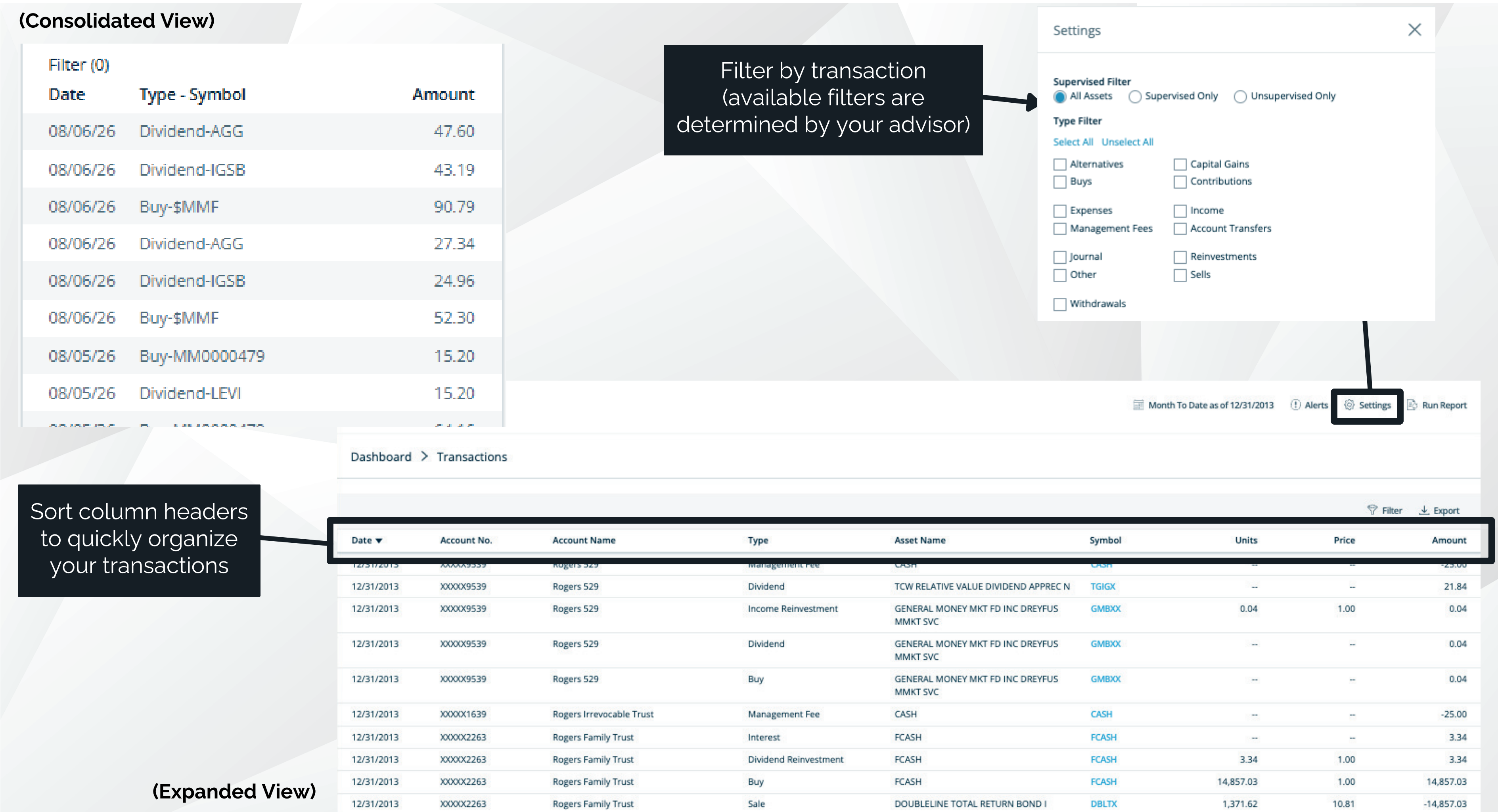
ACTIVITY SUMMARY

View activity and changes in your portfolio or account balance.



TRANSACTIONS

View and filter the most recent transactions in your portfolio.



GAIN LOSS

View realized and unrealized gain/loss information for your investments.

(Consolidated View)

Gain Loss >

Unrealized		Realized		Total
1.4M	+	9.8K	=	1.4M

Unrealized Gain Loss	**1,380,914**
% UGL	5.41%
Short-Term	227,571
Long-Term	1,153,343
Realized Gain Loss	**9,785**
% RGL	91.32%
Short-Term	--
Long-Term	9,785

View your high level gain/loss breakdown from the dashboard

Month To Date as of 12/31/2013 Alerts Settings Run Report

Dashboard > Gain/Loss

Group by: Classes | Expand Level Collapse All Export

Name	Symbol	Open Date	Current Units	Cost Basis	Price	Accrual	Ending Value	Unrealized ST	Unrealized LT	Total UGL
Rogers Family	--	01/01/1950	--	2,733,094.54	--	786.15	4,378,737.92	-1,107.66	1,843,832.06	1,842,724.41
Cash & Equivalents	--	12/31/2013	--	588,972.92	--	--	588,972.92	--	--	--
Equities	--	01/01/1950	--	895,303.38	--	786.15	2,418,742.12	11,815.72	1,696,466.05	1,708,281.77
Fixed Income	--	08/01/2006	--	405,677.92	--	--	519,419.83	-296.56	18,073.48	17,776.92
Alternative Assets	--	04/08/2009	--	843,140.32	--	--	851,603.05	-12,626.82	129,292.53	116,665.72

Sort column headers to quickly organize your cost basis information

Expand and collapse the grouped sections

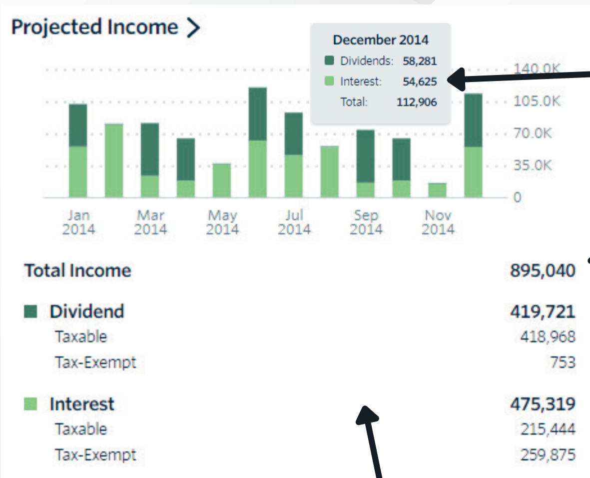
(Expanded View)

Note: The realized Gain/Loss figures illustrated above are estimated through the report date and reconciled with the custodian several business days after each month end. Mutual Fund capital gains distributions, if any, are not illustrated in the figures above. Please contact your Wealth Advisor or Portfolio Manager for Mutual Fund capital gains distributions.

PROJECTED INCOME

Review a snapshot of expected dividend and interest payments.

(Consolidated View)

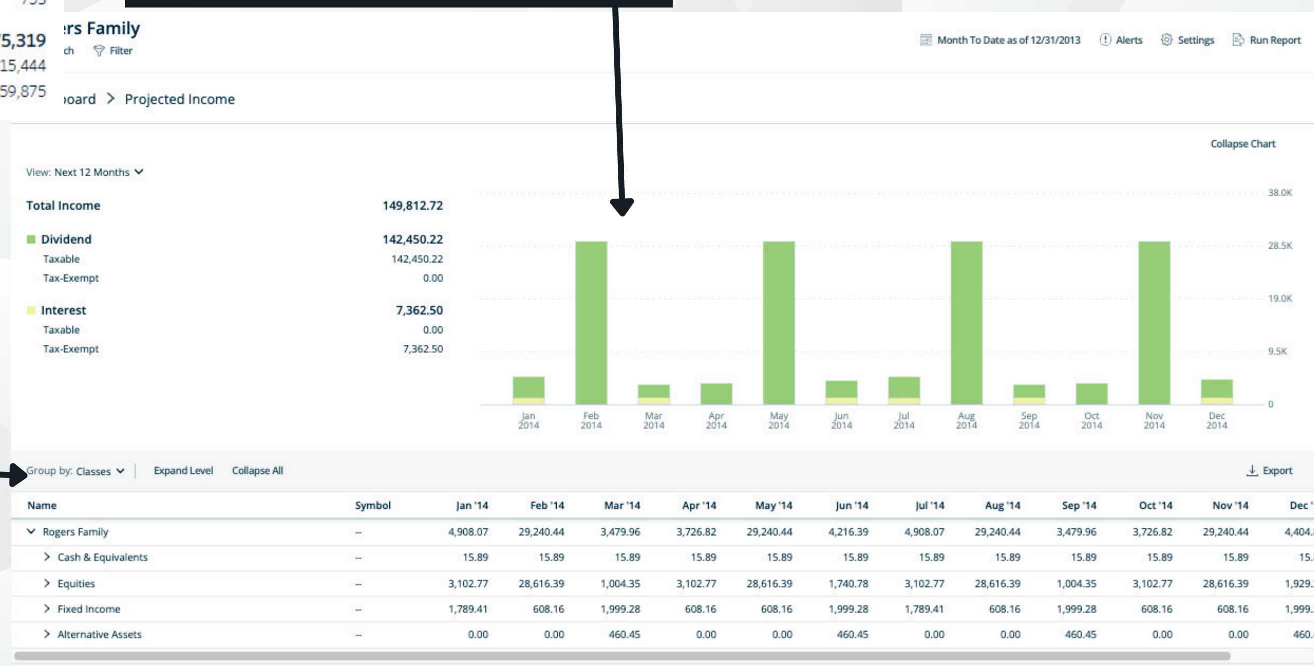


Hover to view monthly dividend and interest detail

The card displays total projected income for the selected time period, a breakout of projected dividends and interest, plus a month-by-month bar chart

Choose between viewing projected income for the Next 12 Months or the Remainder of Year

View projected income at your grouped level



(Expanded View)