ADVICEWORKS™

Your Financial Big Picture. Always in Focus.

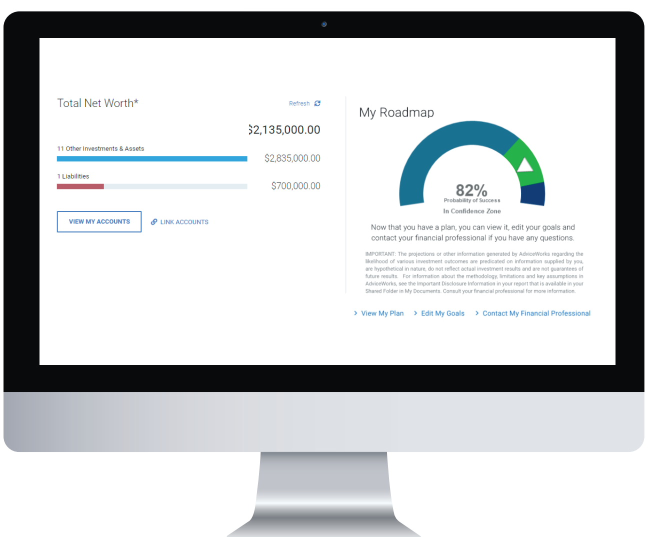
You bring the big picture. AdviceWorks brings ease and clarity to it.

Now it's even easier to work toward your big picture for the future—however you define it.

AdviceWorks gives you a holistic view of your finances, helping you keep track of your financial goals and your progress toward them, while fostering seamless collaboration with your financial professional—whether you're at home, at work, or on the go.

This innovative digital platform delivers a powerful combination of **clarity, collaboration,** and **security,** allowing you to quickly view all your financial accounts in one place, share important information, and measure your progress in real time.

AdviceWorks isn't just designed to simplify your finances, it also helps you save time—so you can spend more of it living your future, and less planning for it.



Simplify Your Finances with AdviceWorks

- **View all your accounts in one place for a comprehensive financial picture, 24/7**
- **Easily collaborate with your financial professional**
- **Create or update existing goals**
- **Dynamically plan for various financial scenarios**
- **Measure your progress in real time**
- **Store and share documents in your secure, online vault**

ADVICEWORKS™

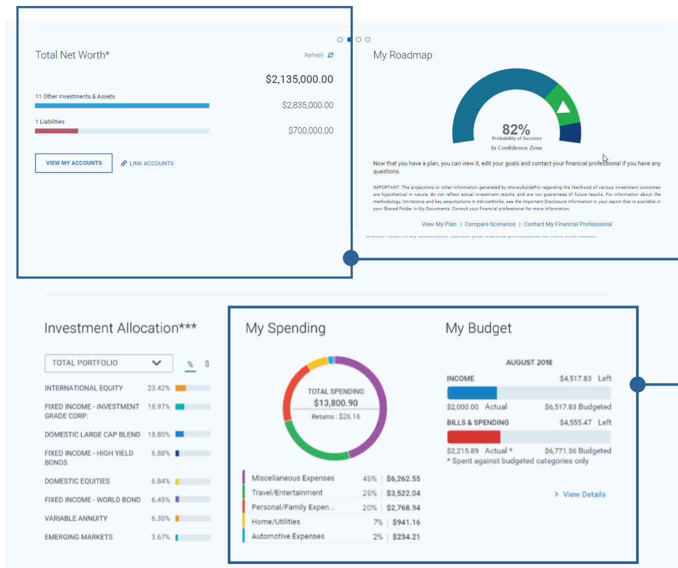
Ways AdviceWorks takes the guesswork out of planning for your financial future:

Key Financial Information At-A-Glance

Clarity

See your big picture anytime, from anywhere

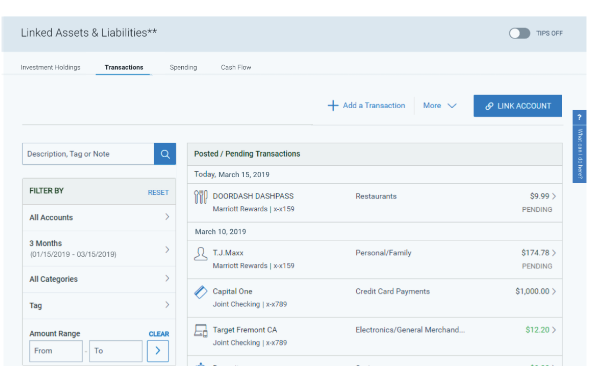
By linking your investment and bank accounts, mortgage, real estate and other assets and liabilities, AdviceWorks offers a more complete view of your finances, making it easier for you and your financial professional to gain deeper insight into your current situation and create a customized plan built for your goals.

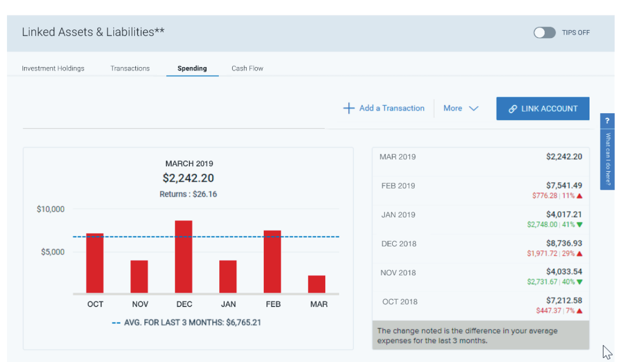


Total Net Worth incorporates all accounts you link regardless of where they are held.

Budgeting Tools Track spending, set goals, and follow progress in real time.

Budgeting Tools Track Transactions, Spending, and Cash Flow



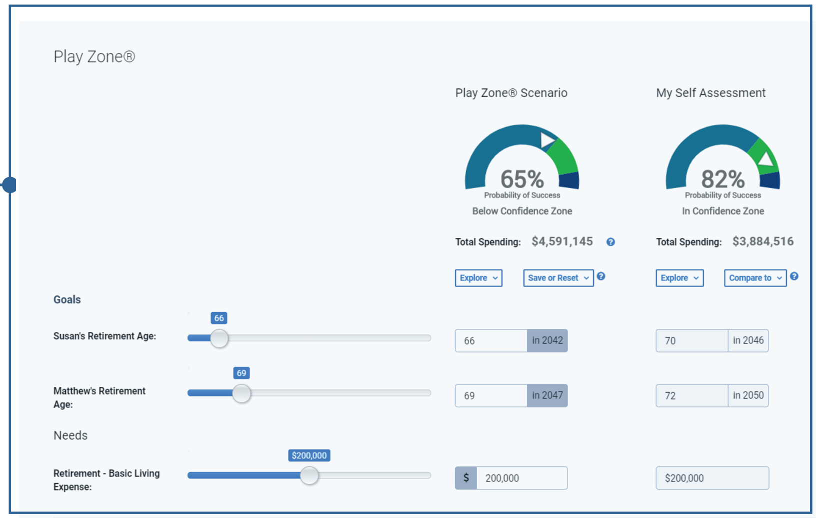


Collaboration

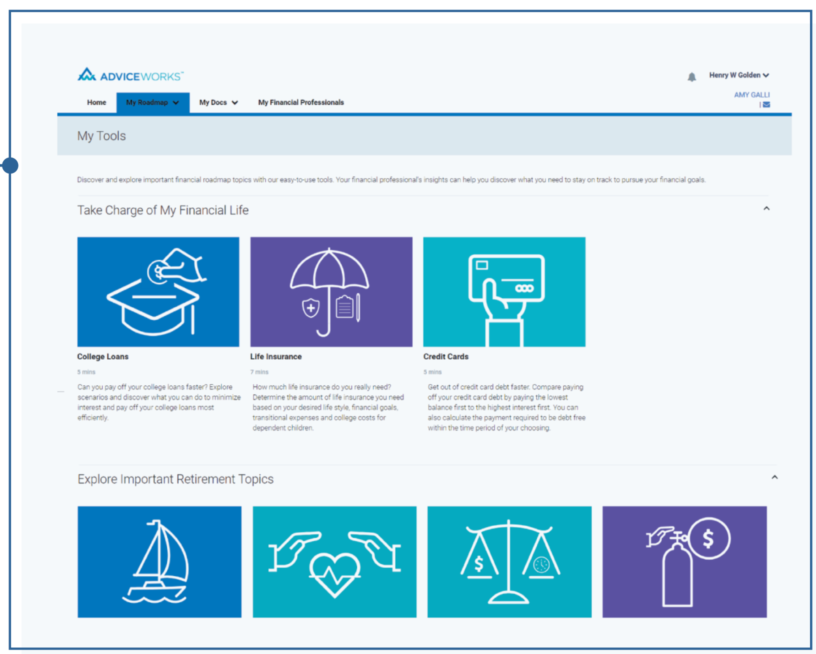
Build wealth through planning and guidance

Benefit from access to user-friendly planning tools that help you and your financial professional address a variety of planning considerations, from asset allocation to college, insurance, and retirement planning, and more, with scenario-planning modules and tools.

Your Plan
Complete the assessment and goals section to help identify where you are now, and where you want to be. With interactive tools you can update goals, adjust scenarios and alert your financial professional to changes in your life that may affect your plan. If you have completed a financial plan, you can find the full copy stored in **My Docs.**



My Roadmap Tools
My Roadmap Tools provide easy-to-use financial planning modules that let you learn, explore, and dive deeper into the financial areas that matter most to you.



ADVICEWORKS™

Security

Leverage the convenience of your secure online vault

AdviceWorks incorporates multiple layers of data protection, giving you a secure online vault for all your personal documents and information—with only one password to remember.

Shared Folders
Quickly access your investment statements, reports, tax information, or planning documents.

Private Folders
Upload copies of wills, trusts, passports, driver's licenses, and other important documents for easy access anywhere, any time.

Your Security is Our Priority

Rest assured that your personal and financial information on AdviceWorks is protected and defended continuously with robust security solutions and processes that adhere to regulatory requirements and industry best practices for cybersecurity. We've worked to develop multiple layers of protection, so your information stays safe:

- Multifactor authentication is required for each device used to access your account
- Data encryption technology makes data unreadable to unauthorized parties
- Industry-leading, cloud-based financial technology services ensures confidential data remains secure when linking accounts held outside of AdviceWorks
- Cyberthreat monitoring detects vulnerabilities that could be exploited

ADVICEWORKS™

Put the clarity, collaboration and security of AdviceWorks to work for you.

To enroll in AdviceWorks, contact your financial professional to receive your login information.

Cetera®