



Welcome to Potomac Wealth Advisors, LLC. On-Line Access:

At Potomac Wealth Advisors, LLC we aim to provide you with detailed information on your accounts at any time, day, or night. At the same time, we are committed to protecting the privacy and data security of our clients. Experts recommend that you change your passwords frequently. It is also recommended that you do not use your name, account number, social security number, or date of birth, and not use the same password for multiple sites.

To access your accounts online, and to protect your privacy, please familiarize yourself with the following tools:

1) To View Your Accounts with Potomac Wealth Advisors, LLC.

- a) Go to our webpage, www.PotomacWealth.com.
- b) At the home page, click on the "Account Login" button in the upper right.
- c) Select Link #1 "View your accounts with Potomac Wealth Advisors."
- d) Enter your user ID and Password (If you don't remember your password, e-mail Support@PotomacWealth.com and request a password reset, or call 301-279-2221).

2) To Retrieve Your Statements or 1099 forms for "47G" Pershing Investment Accounts click this link:

- a) Go to our webpage, www.PotomacWealth.com
- b) At the home page, click on the "Account Login" button in the upper right
- c) Select Link #4 "Retrieve Your Statements or 1099 forms for Account Starting with 47G"
- d) Enter the financial organization number **47G**, User ID and Password (If you don't remember your password, e-mail Support@PotomacWealth.com and request a password reset, or call 301-279-2221).

**3) To Retrieve Your Statements or 1099 forms for "5YV"
(Envestnet) Pershing Advisor Solutions Investment Accounts
click this link:**

- a) Go to our webpage, www.PotomacWealth.com
- b) At the home page, click on the "Account Login" button in the upper right
- c) Select Link #5 "Retrieve Your Statements or 1099 forms for Account Starting With 5YV"
- d) Enter the financial organization number **5YV**, User ID and Password (If you don't remember your password, e-mail Support@PotomacWealth.com and request a password reset, or call 301-279-2221).

"Securities and Investment Advisory Services offered through H. Beck, Inc. Member FINRA, SIPC 6600 Rockledge Drive, 6th floor,
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H. Beck, Inc. is unaffiliated with Potomac Wealth Advisors, LLC"