



BIRCHWOOD
FINANCIAL PARTNERS

Private Client Portal



In our ongoing effort to enhance the quality of the service we provide to our clients, we are pleased to introduce a [new website](#) for Birchwood clients to access timely investment portfolio information.

The new website will provide access to investment performance, portfolio allocations, portfolio activity and quarterly consolidated performance reports. The site also provides a secure vault for sharing documents between Birchwood and our clients.

Other key features and benefits include the following

- 24/7 access
- Alerts and notifications
- Compatible with any device
- Paperless and eco-friendly
- Document storage and sharing

- Your Birchwood Team

Navigate the Private Client Portal

The screenshot shows the Private Client Portal interface for Birch & Apple Wood. The top navigation bar includes a search icon, the firm name, and a date range selector set to 'Last 12 Months as of Last Business Day (12/31/2013)'. A left-hand navigation menu is visible, listing options like Dashboard, Activity Summary, Allocation, Allocation Vs Target, and Performance. The main content area is divided into several cards: Performance (line chart), Documents (list of folders and reports), Allocation vs Target (donut chart), and Activity Summary (area chart). Callout boxes provide instructions on how to interact with these elements.

Callout 1: Click to collapse the menu

Callout 2: View your entire household or switch to a single account

Callout 3: Edit the active date range

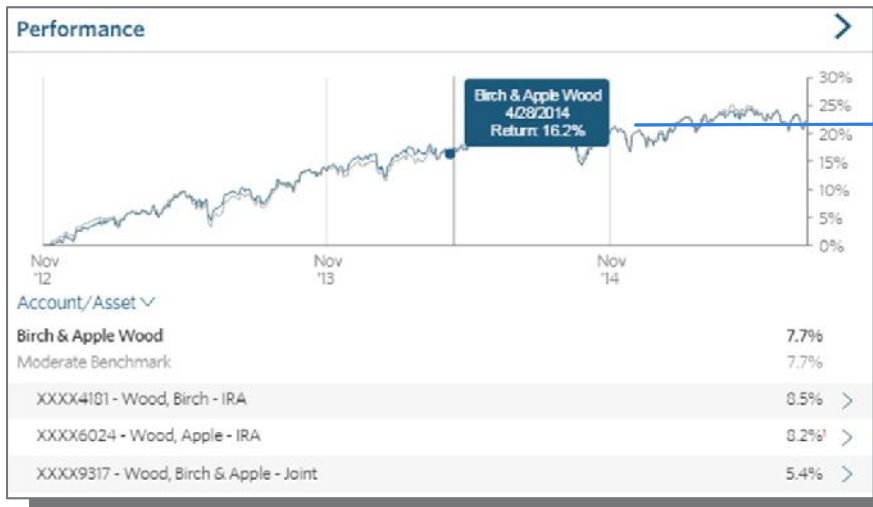
Callout 4: View notifications from your advisor

Callout 5: Update your account settings

Callout 6: Use arrows or menu at far left to see expanded view of card

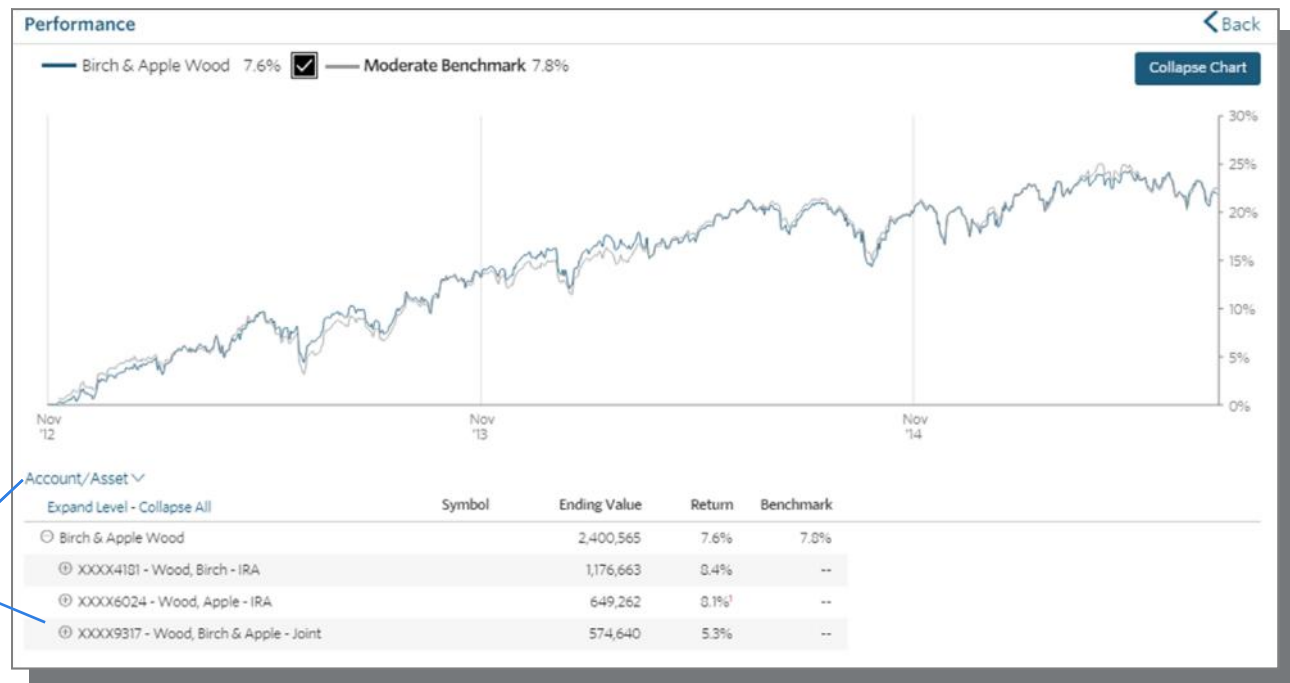
Callout 7: Detailed examples of available cards are shown on pages 4 – 7.

Performance : View investment performance across your portfolio



(consolidated view)

Hover to view returns through a specific date



Expand and collapse the grouped sections

(expanded view)

Documents: Store personal documents and access files shared by your advisor

| DOCUMENTS | | Type | File Size | Updated |
|--------------------------|------|-------|-----------|---------|
| Sample Tax Document.docx | File | 12 KB | 03/26/15 | |
| Sample Tax Document.docx | File | 12 KB | 04/01/15 | |
| Tax docs.docx | File | 12 KB | 03/20/15 | |
| Taxes.docx | File | 12 KB | 03/20/15 | |

(consolidated view)

Upload documents to Birchwood in an easy and secure manner

Documents will only be seen by you and your Birchwood team

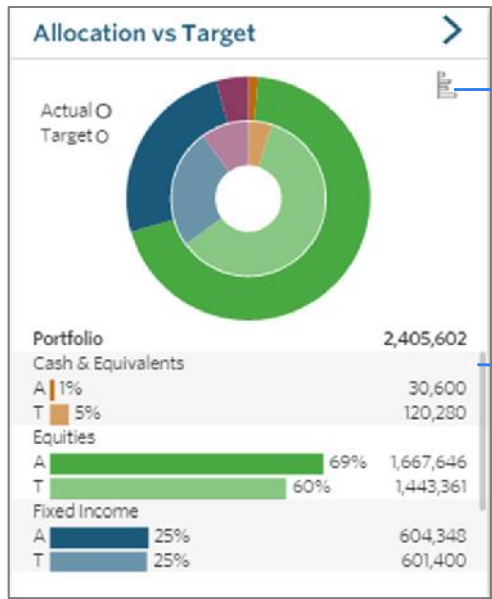
Organize documents by creating folders

View both documents and quarterly performance reports in one place

| DOCUMENTS | | Start Date | End Date | File Size |
|---------------------------------------|------------|------------|----------|-----------|
| Performance Report: Executive Summary | 12/21/2008 | 12/30/2013 | 239 KB | |
| Quarterly Performance Report | 12/21/2008 | 12/30/2013 | 852 KB | |

(expanded view)

Allocation vs Target: Compare your current allocation to your portfolio targets

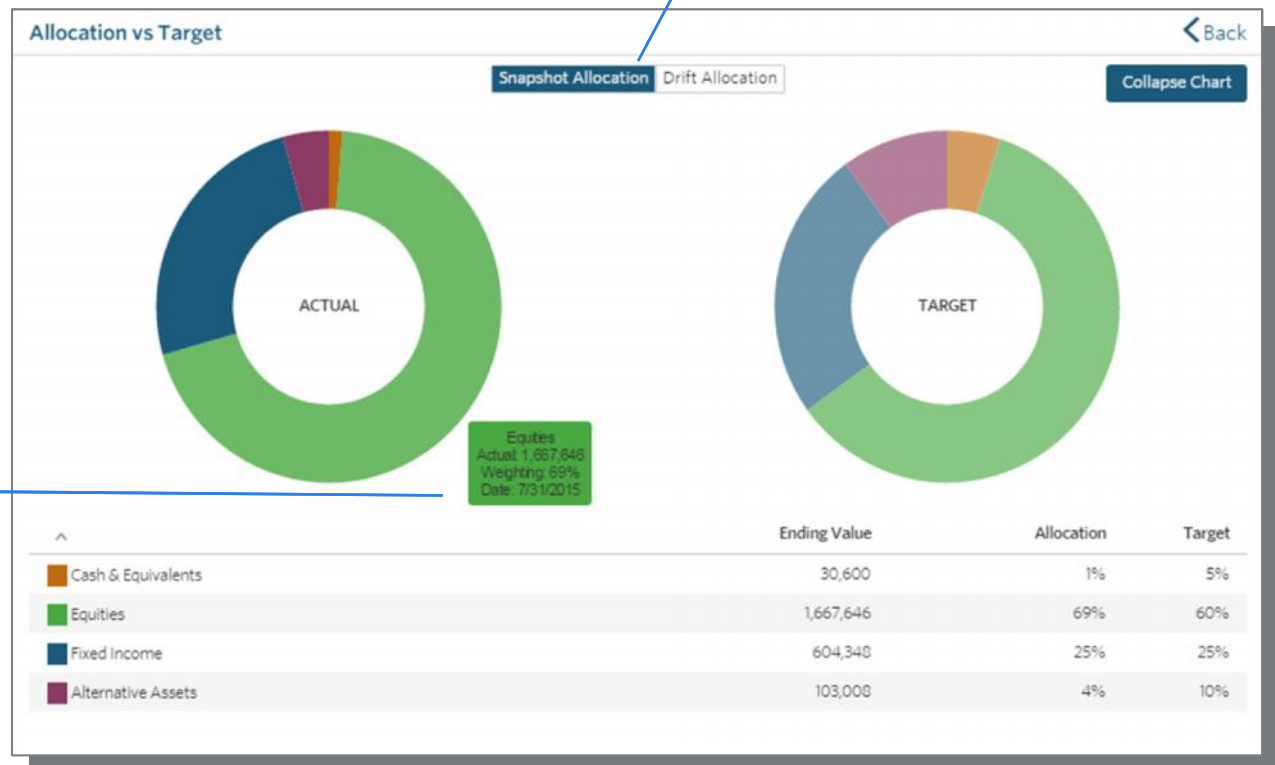


(consolidated view)

Toggle to view a donut graph or bar chart

Use scroll bar to view all allocations

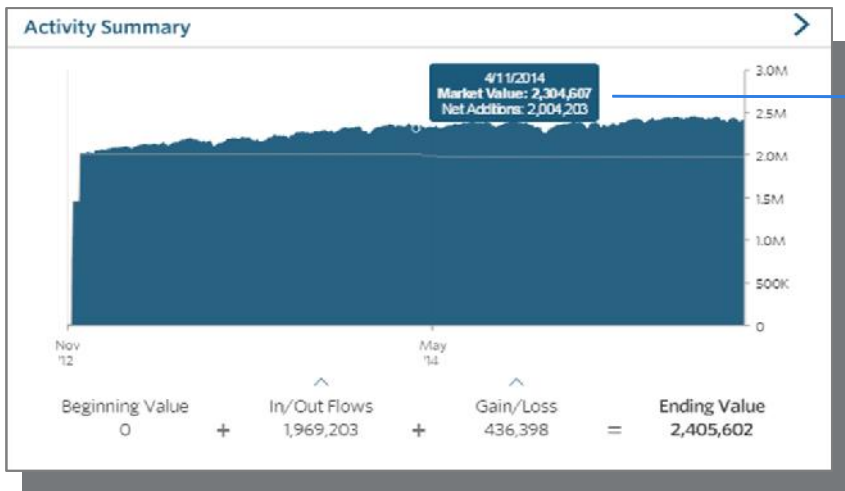
View Snapshot or select Drift Allocation to view allocation over a period of time



Hover over graphs to display additional details

(expanded view)

Activity Summary: View activity and changes in your portfolio or account balance

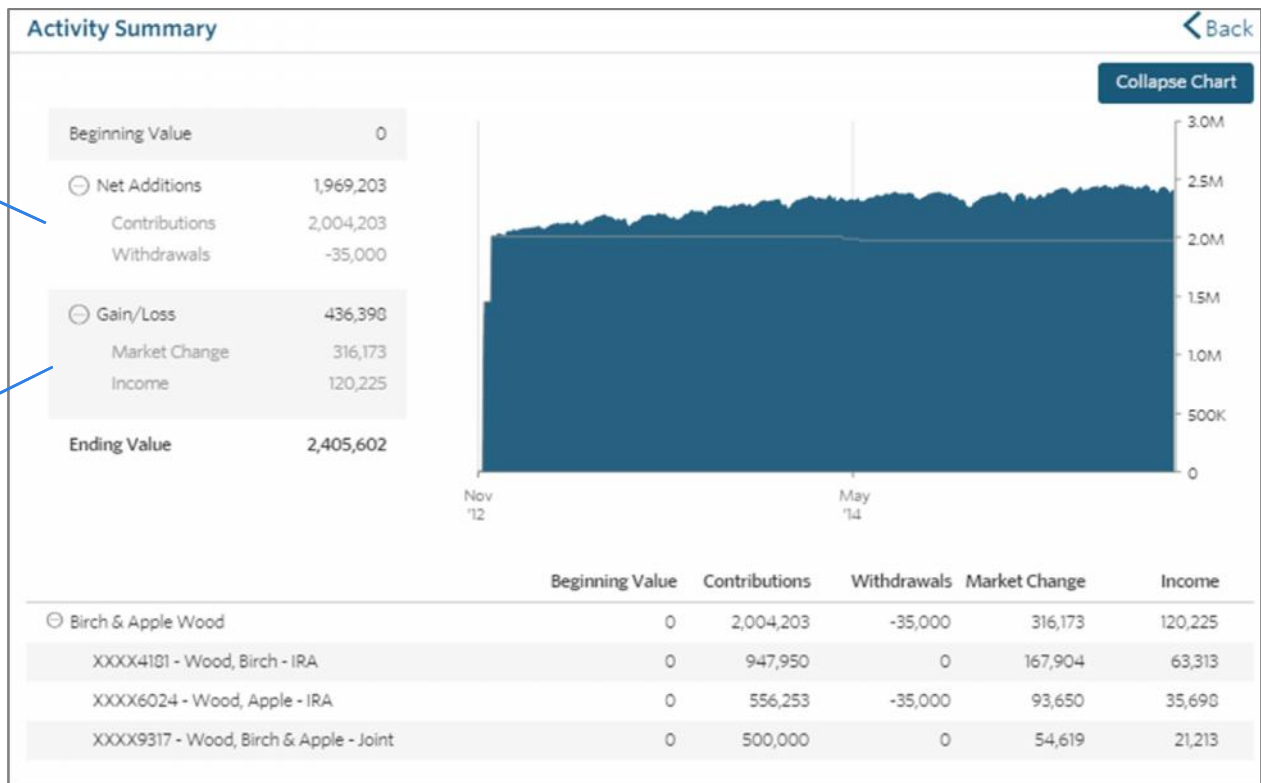


(consolidated view)

Hover to view the market value for a specific date

View breakout of additions and withdrawals

See income and performance breakouts



(expanded view)

Login Problems: How to access your account if you have trouble signing in to the site

J_Investor

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Sign in

Trouble logging in? ▾

- Forgot password
- Forgot username
- Unlock account

Error! Invalid username and password combination. ✕

Error! Your user account has been locked. Please click "Trouble logging in?" to unlock your account. ✕

Select "Trouble logging in?" on the sign-in page for help

You will receive an email with a link to access the site

Follow the steps provided to resolve login issues

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


--- This is an auto generated email. Please do not reply. ---

Mobile Access: Bookmark the Private Client Portal on your mobile device.

Open the browser on your mobile device and navigate to: <https://bd3.bdreporting.com/Auth/SignIn>

**Note: If using iOS, you must use Safari to add the Private Client Portal to the Home Screen*

iPhone/iPad

- 1) Login with your username and password
- 2) Select the  icon
- 3) Select “Add to Home Screen”
- 4) Select “Add”

Android

- 1) Login with your username and password
- 2) Select the [:] icon
- 3) Select “Add to Home Screen”
- 4) Select “Add”

Information Security

We take your privacy seriously and this platform has implemented strong security measures and data protection policies. All investment data and documents are stored in high-security data centers with multiple layers of protection in place. Information on this site is read-only and follows relevant federal and state privacy protection regulations.