

# Access Online

Online convenience to help you monitor your investments

We understand that in this fast-paced world, you need to have access to your investment accounts whenever it's most convenient for you. Access Online lets you do just that, with new features and functionality to help serve you better on any device.

Up-to-date, detailed information about your accounts, the latest news and research reports, and much more are available for viewing 24 hours a day, 7 days a week.\* You'll also have the comfort of working with your financial professional to help you reach your financial goals.

If you like to stay on top of your portfolio, Access Online provides you with great tools to help monitor your investments.

**Brokerage Overview** | Portfolio | Research | Customer Service

All Brokerage Accounts | Total Value: **\$202,933** | Today's Change: **+\$5,056 (+2.59%)** | Priced as of Close on 04/17/2020 | Refresh

**Account Summary**

Account	Securities Market Value	Today's Change	Cash & Cash Alt.	Margin Balance	Account Value
11135	\$36,263.71	+\$996.17 (+2.82%)	\$164.79	\$0.00	\$36,418.50
11136					
11210	\$163,980.33	+\$4,061.80 (+2.54%)	\$2,634.66	\$0.00	\$166,614.99
11210					
All Brokerage Accounts	\$200,244.04	+\$5,056.67 (+2.59%)	\$2,889.45	\$0.00	\$202,933.49

**Holdings Snapshot**

Asset Class	Market Value	Today's Change
Stocks	\$34,088.68	+\$1,032.27 (+3.12%)
ETFs	\$2,716.00	+\$260.80 (+10.62%)
Mutual Funds	\$163,439.66	+\$3,763.60 (+2.36%)
Cash/Cash Alternatives	\$2,689.45	

Asset Allocation

## Real-time account information and convenient services

- The Brokerage Overview allows you to access all of your account information in one place. Review your account summary, holdings, allocation, performance, and more on one consolidated page.
- View real-time account information for your individual accounts, or for your entire household.
- Download your account information to Quicken® or Microsoft® Excel.
- Enjoy the convenience of electronic delivery of statements, trade confirmations, and/or shareholder communications. You can change and customize your document delivery preferences at any time.
- Securely access new account documents as soon as they are created as well as previously issued documents for the last seven years.

**Brokerage Overview** | Portfolio | Research | Customer Service

All Brokerage Accounts | Total Value: **\$202,933** | Today's Change: **+\$5,056 (+2.59%)** | Priced as of Close on 04/17/2020 | Refresh

Holdings | Activity | Balances | Performance | Orders | Statements & Docs

Positions | Asset Allocation | Realized Gain/Loss | Income | Custom Views | Quick Links

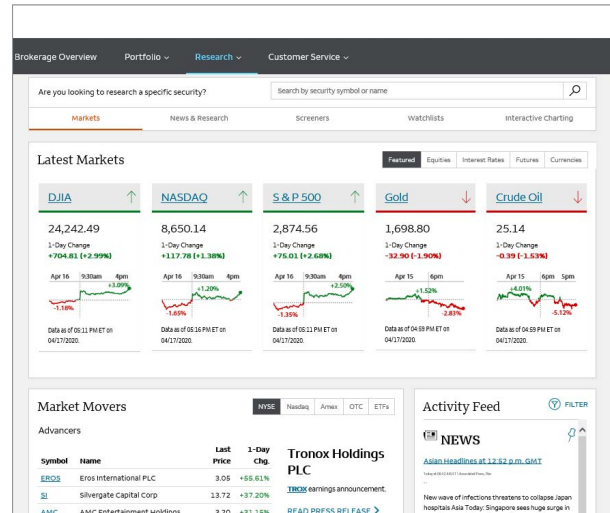
**Stocks**

Symbol/Description	Trade Date	Shares @ Cost	Last Price/Change	Market Value/Today's Change	Unreal Gain/Loss	Estimated Annual Income	Actions
KREE KIRK REAL ESTATE FINANCE	Multiple(3) @ \$20.11	800.000 +\$0.38	\$16.05 +\$0.38	\$7,526.00 +\$90.00 (+1.21%)	-\$2,630.63 -26.27%	\$860.00	-Select-
GILD GILEAD SCIENCES INC	Multiple(2) @ \$68.48	80.000 +\$7.45	\$83.99 +\$7.45	\$6,719.20 +\$696.00 (+9.73%)	+\$1,240.75 +22.65%	\$217.60	-Select-
BMY BRISTOL MYERS SQUIBB	02/14/2017 @ \$64.61	74.000 +\$1.04	\$60.60 +\$1.04	\$4,484.40 +\$76.96 (+1.75%)	+\$460.35 +11.16%	\$133.20	-Select-
BTI BRITISH AMERN TOB PLC	08/24/2018 @ \$51.05	100.000 +\$0.46	\$37.60 +\$0.46	\$3,760.00 +\$46.00 (+1.24%)	-\$1,354.95 -26.64%	\$268.80	-Select-
IBM INTERNATIONAL BUSINESS	03/06/2020 @ \$126.00	26.000 +\$4.39	\$120.12 +\$4.39	\$3,003.00 +\$109.75 (+3.79%)	-\$122.00 -3.90%	\$162.00	-Select-
QCOM QUALCOMM INC	02/14/2017 @ \$59.91	36.000 -\$0.68	\$76.17 -\$0.68	\$2,742.12 -\$24.48 (-0.88%)	+\$729.32 +26.23%	\$89.28	-Select-
ENB ENBRIDGE INC	01/09/2019 @ \$34.83	70.000 +\$0.90	\$29.40 +\$0.90	\$2,058.00 +\$63.00 (+3.16%)	-\$379.95 -16.58%	\$161.57	-Select-
TEE TELEFONICA S A	Multiple(2) @ \$7.68	401.000 +\$0.04	\$4.66 +\$0.04	\$1,828.66 +\$16.04 (+0.88%)	-\$1,260.88 -40.62%	\$137.94	-Select-
E FORD MOTOR	02/14/2017 @ \$12.75	237.000 +\$0.18	\$6.12 +\$0.18	\$1,213.44 +\$42.66 (+3.64%)	-\$1,807.80 -99.84%	N/A	-Select-

\* During times of high volume of trading at the market opening, or intra-day, clients may experience delays in system access, or execution at prices significantly away from the market price quoted or displayed at the time the order was entered.

## Information at your fingertips

- Obtain real-time quotes, news, interactive charts, company profiles, ratings, and research reports to help you select securities for your portfolio.
- Set up Market Alerts to be sent to any device with an e-mail address (i.e., desktop, smartphone or tablet). You can receive alerts for individual securities, entire portfolios, or specific industries.
- Launch Portfolio Tracker to get 15-minute delayed streaming quotes, news, and charts on your desktop. Receive updates throughout the day on market indexes, securities, and breaking news on your portfolio, even after logging off of Access Online.
- Find the investments that match your criteria with access to more than 10,000 securities.



## Expand your knowledge

Stay up-to-date with information and articles:

- Market highlights
- Key indicators
- Earnings announcements

## Getting started

To enroll your account(s) for Access Online visit your firm's Access Online site.

For enrollment assistance, contact Access Online support at: 1-888-889-1401 (inside the U.S.) 24 hours a day, 7 days a week 1-704-383-2127 (outside the U.S.) Monday–Friday, 8:00 a.m.–5:00 p.m. ET

## Sign on is easy

Once you're enrolled, simply go to your firm's AccessOnline site and enter your username and password to access your account(s).

