

TFG Client Portal – Portfolio Tab

Menu Choices

User Settings Demo Client

Account Information

ALL ACCOUNTS
\$1,241,265.22

MANAGED \$1,191,265.22

- Demo Client Cust for Child-Custodial XXXXXX5555 \$9,684.14
- Demo Client-Contributory IRA XXXXXX6666 \$587,177.10
- Demo Client-Individual XXXXXX3333 \$459,056.27
- Demo Client-inherited IRA XXXXXX4444 \$12,501.27
- Demo Client-Roth XXXXXX1111 \$122,846.44

UNMANAGED ACCOUNTS \$50,000.00

Demo & Demo Client-Joint XXXXXX2222 \$50,000.00

Overview Change Date As Of 02/08/2019

Interactive, On-Screen Data

Grouping Options

Print Screen

As Of Value VALUE ON 2/8/19 \$1,191,265

Invested vs. Cash

Advisor Information

YOUR ADVISOR
TULL FINANCIAL GROUP, INC.
757-436-1122
640 Independence Parkway
Suite 300
Chesapeake, VA 23320
TFG Website

Holding	Market Value	Units	Price	Percent
Demo Client-Contributory IRA	\$587,177.10	--	--	49.29 %
Demo Client-Individual	\$459,056.27	--	--	38.54 %
Demo Client-Roth	\$122,846.44	--	--	10.31 %
Demo Client-inherited IRA	\$12,501.27	--	--	1.05 %
Demo Client Cust for Child-Custodial	\$9,684.14	--	--	0.81 %
	\$1,191,265.22			100.00 %

- Access up-to-date account values, performance, and activity. Your balances are updated by a third party, Orion Advisor Services, by 8:30am Monday through Saturday with the previous day’s values.
- Change your password and enable 2-Factor Authentication from “User Settings.”

TFG Client Portal – Documents Tab

The screenshot displays the TFG Client Portal interface. At the top left is the TULL FINANCIAL GROUP logo. The top navigation bar includes links for Portfolio, Documents, Tools, Updates, Statements, and Cloud Storage. A user profile for 'Demo Client' is visible in the top right. The main content area is titled 'Cloud Storage' and includes a sub-header 'AdvisorShared'. A table lists a file named 'Demo Tax Return.pdf' with a modification date of 'Feb 11, 2019 3:25:10 PM'. To the right, an 'AVAILABLE DOWNLOADS' section lists several PDF documents, including market updates, newsletters, and privacy notices.

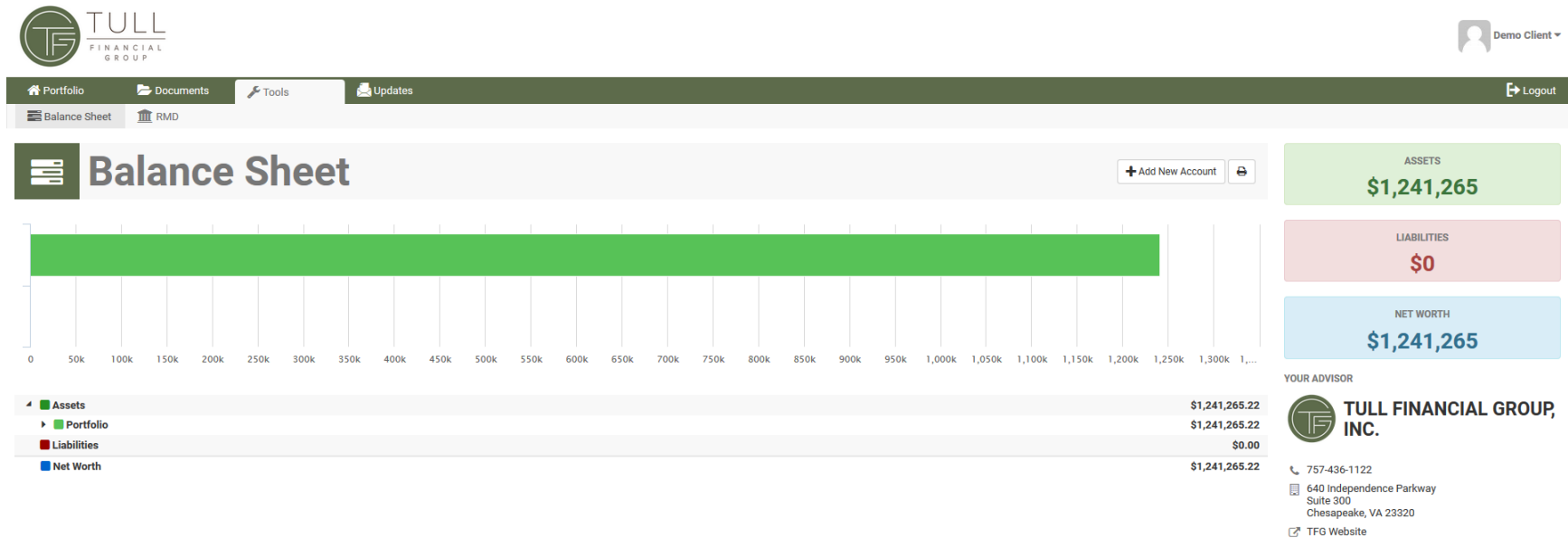
NAME	MODIFIED
Demo Tax Return.pdf	Feb 11, 2019 3:25:10 PM

AVAILABLE DOWNLOADS

- TFG Market Update-June 2018.pdf
- Annual Returns and Intra-Year Declines_1980-2017...
- 2018-1Q TFG Newsletter.pdf
- 2018-2Q TFG Newsletter.pdf
- 2018-3Q TFG Newsletter with Announcement.pdf
- 2018-4Q TFG Newsletter.pdf
- 2018-0331 2018 Privacy Notice.pdf
- 20180706 FOR CLIENTS_TFG ADV Part 2AB v2.pdf

- View and print your quarterly statements on the “Statements” tab, beginning with your 1st Quarter 2019 report.
- Efficiently share important documents with the TFG Team on the “Cloud Storage” tab using TFG’s secure AdvisorShared folder, powered by Dropbox.
- Access available downloads such as our quarterly newsletter, company documents, and other items of interest on the right-hand side of the screen.

TFG Client Portal – Tools Tab



- Create a snapshot of your holistic net-worth on the “Balance Sheet” tab.
- Review your Required Minimum Distribution(s), if applicable, and if it has been satisfied on the “RMD” tab.

TFG Client Portal – Updates Tab

TFG TULL
FINANCIAL
GROUP

Portfolio Documents Tools Updates Logout

Commentary

ADVISOR CHECKLIST

- In Process: Update Address**
Due: 2/18/19
Assigned: TFG Team Member
- Completed: Schedule Meeting?**
Due: 5/1/19
Assigned: TFG Team Member

Create Task

Advisor Commentary
Latest news and information from your advisor.

- TFG Market Update**
The Stock Market is Making a Comeback, Despite Trade War, Shutdown, and Brexit
- 2018 Market Volatility and Performance - Q&A**
- TFG Update**
Year-End Tax-Loss Harvesting

AVAILABLE DOWNLOADS

- TFG Market Update-June 2018.pdf
- Annual Returns and Intra-Year Declines_1980-201...
- 2018-1Q TFG Newsletter.pdf
- 2018-2Q TFG Newsletter.pdf
- 2018-3Q TFG Newsletter with Announcement.pdf
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- 2018-0331 2018 Privacy Notice.pdf
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Jan 22, 2019

Jan 4, 2019

Dec 21, 2018

YOUR ADVISOR

TFG TULL FINANCIAL GROUP,
INC.

- Collaborate with the TFG Team via Advisor Checklist. Create tasks and check back to see the status.
- Gain access to TFG’s latest news and commentary.