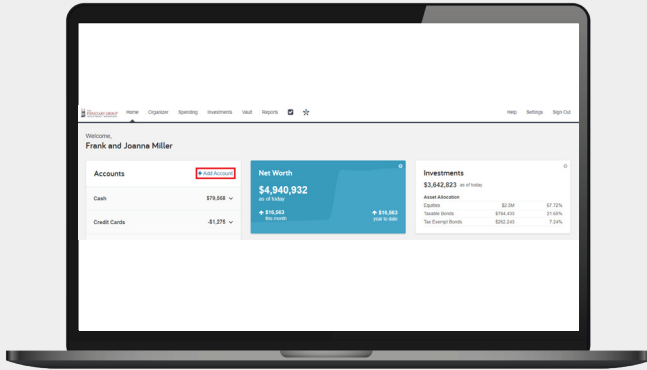


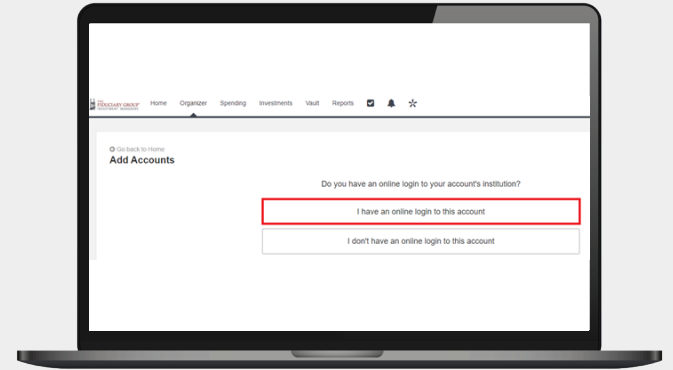
TFG Portal

Your TFG Portal should automatically include your investment accounts that we manage. To take full advantage of the portal, outside accounts can be added. These might include bank accounts, retirement accounts, home value and mortgage, brokerage accounts, or credit cards.

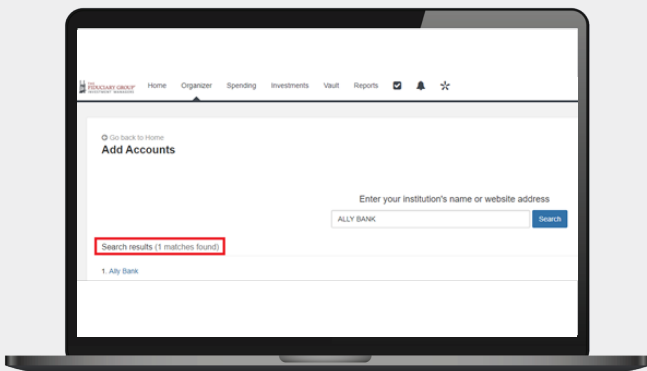
If you have online credentials for these accounts, you can create a live feed to automatically update the account. To establish an account connection, follow the steps below:



1. From the Home tab, click **+Add Account**.

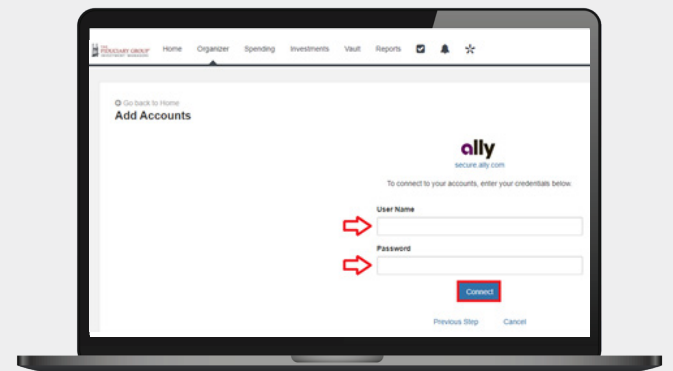


2. Select **I have an online login to this account**.



3. Enter the institution's name and click **Search**.

4. Under **Search Results**, select the institution.



5. Enter your login credentials and click **Connect**.

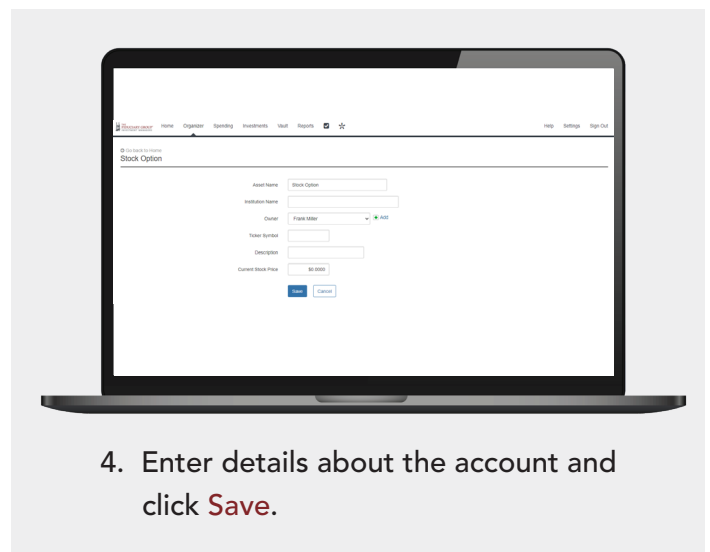
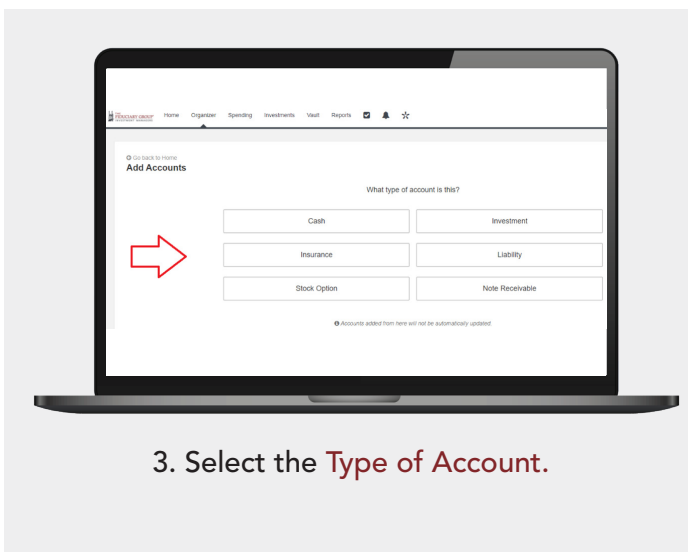
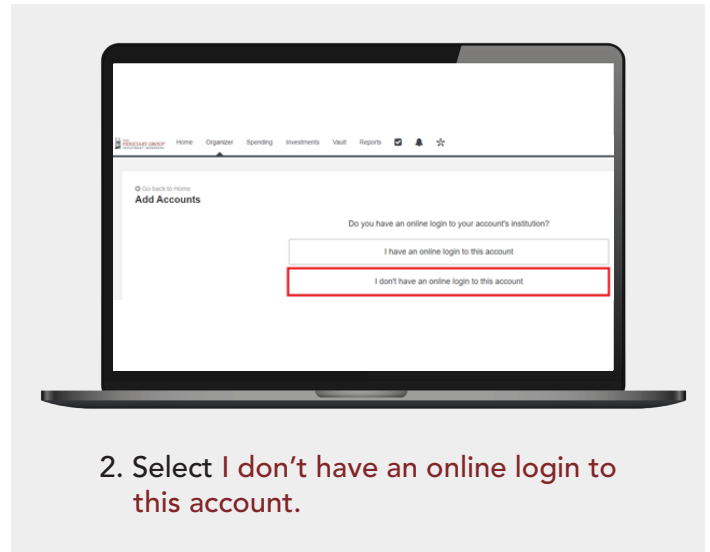
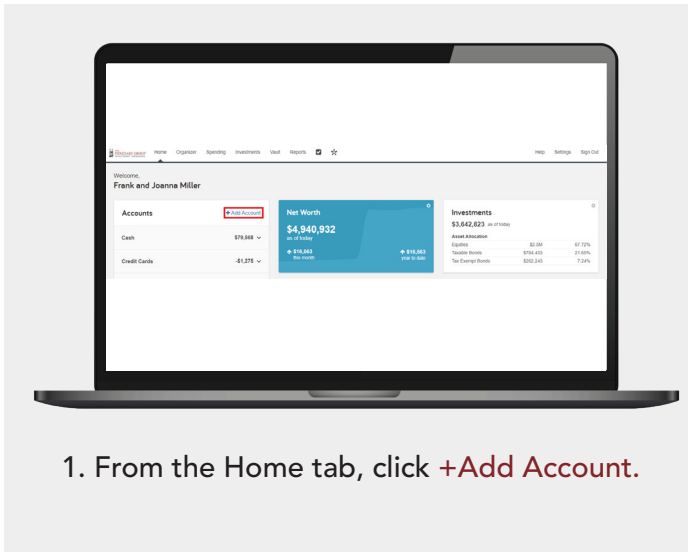
6. Once your credentials are verified, review the accounts from the connection. Click **Continue** to complete the process.

Note: If there is an issue connecting your accounts, you'll receive a status message describing the problem. Click on the message to learn how to correct it.

For additional information, visit tfginvest.com/client-portal.

TFG Portal

If you do not have an online login for an institution, follow the steps below to enter accounts manually. While manual accounts do not automatically update, they help build a better financial snapshot for both you and your advisor.



Note: Adding property, real estate or a private business can be done from the Organizer tab by clicking 'Add Property.'

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