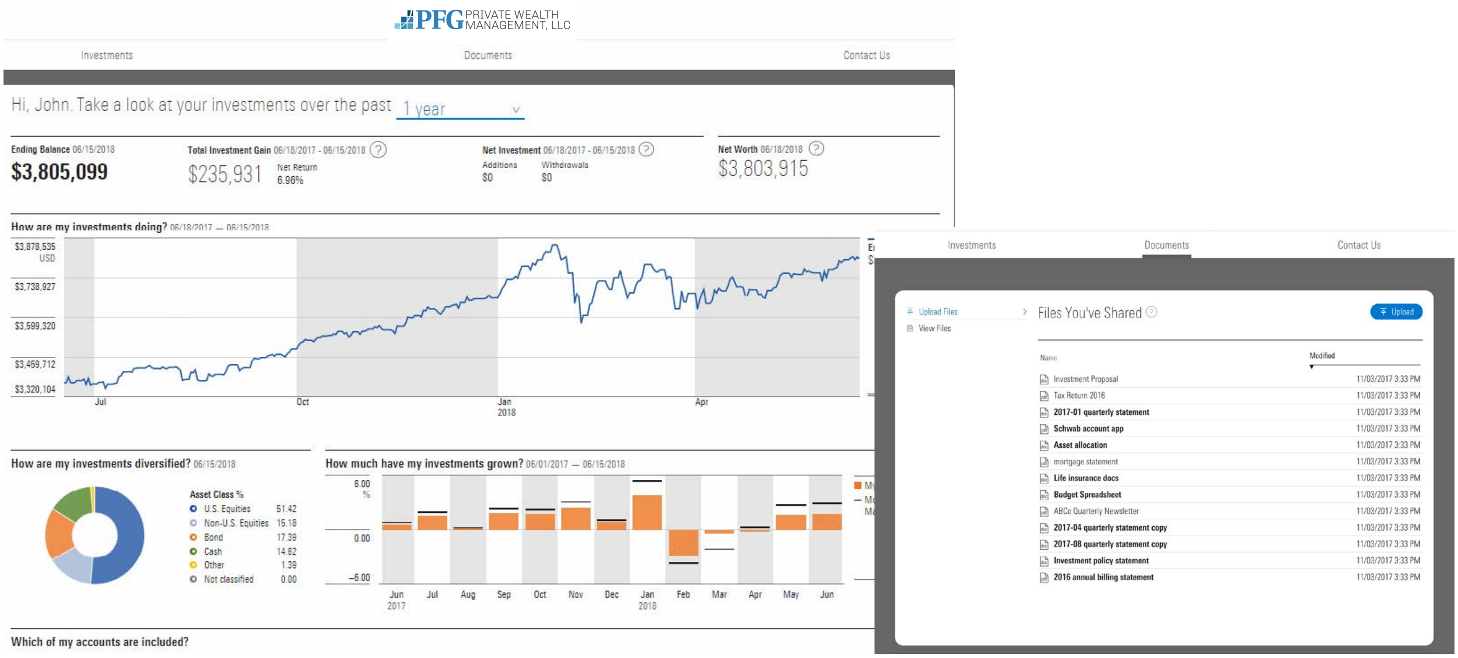
Introducing our
Client Portfolio Reporting Center

Powered by Morningstar*



Connect with your accounts anytime, anywhere, with the Client Portfolio Reporting Center.

What is the Client Portfolio Reporting Center?

The Client Portfolio Reporting Center is a secure website you log in to using your email address and a custom password you create. Inside, you can view up-to-date performance analytics, information about your portfolio and even research the individual securities constituting your accounts. You also have the ability to securely send sensitive documentation to your advisor and receive paperless quarterly reports as well as other documentation from PFG Private Wealth Management.

Complex Made Simple

Let's face it, monitoring your investment portfolio can be complex and overwhelming. In fact, that's probably one of the reasons you hired us. The Client Portfolio Reporting Center delivers an engaging and intuitive snapshot of your portfolio and answers important questions, such as:

- How are my investments doing?
- How are my investments diversified?
- How much have my investments grown?
- What is my current balance?

From basic account details to performance reports, the Client Portfolio Reporting Center puts all the information you need right at your fingertips!

Paperless Reporting

With paperless reporting, you don't have to worry about filing or shredding documents you no longer need. You can access your reports online at anytime and keep everything organized in the *Documents* area of the Reporting Center.

Paperless reporting is more secure - Mail theft is one of the most common ways identity thieves capture your information, so you don't have to worry about someone stealing your reports through the mail.

Paperless reporting is better for the environment!

How do I access the Client Portfolio Reporting Center?

Before logging in to the Reporting Center, check your inbox. We will be sending you an email that contains instructions on how to activate your account. It is important that you activate the account immediately, as the link will expire after 12 hours. Don't have a chance to activate your account within 12 hours? No problem! You will receive a second email alerting you that the invitation has expired with instructions on generating a new invitation. Once your account is activated, you can access the Reporting Center via the *Login* menu at www.pfgprivatewealth.com

To learn more or to request a demo
Call: (813) 286-7776
Visit: www.pfgprivatewealth.com