Weston's Client Portal - Overview

Weston has partnered with Envestnet | Tamarac™, a leading provider of integrated and web-based portfolio and client management software, to maintain a client portal for Weston Financial clients. The secure portal allows you to review account reports and other documents online at any time, as well as communication tools to interact with your Weston counselor.

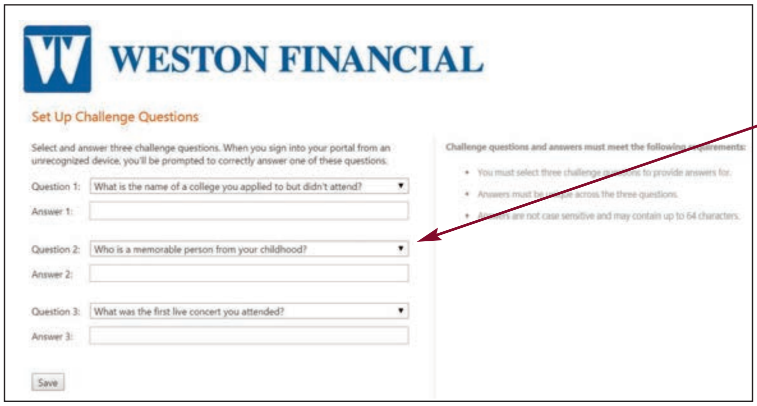
Please note: In order to access the Client Portal, you should use one of the following supported browsers:

- ***For Windows: Internet Explorer 11, Edge, Chrome, or Firefox***
- ***For Mac: Safari 9.1.2 or later***

Initial Sign-In

*The first sign-in to your Client Portal is a **simple three-step process.***

1. *Click on "Set New Password" link in initial email.*
2. *Establish and confirm new password.*
3. *Sign in to your Client Portal using the email address associated with your Weston account(s) and your newly created password.*



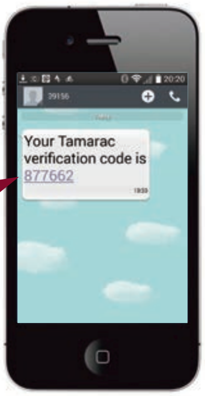
Answer three Challenge Questions for your online security

*The first time you sign in to the Client Portal, you will need to answer three **Challenge Questions** for security purposes. If you ever sign in to the Client Portal from an unrecognized device, you will need to answer one of the Challenge Questions to gain access to the Portal. If you opt-in to SMS Messaging (see below), a code will be sent to your mobile phone.*

SMS Set-Up

*You may opt-in to sign up for **SMS Messaging through your mobile phone** by providing your mobile phone number, typing in the code sent to your mobile phone, then clicking "Save."*

When you opt-in to SMS Messaging, we will send you a text to confirm your sign-up



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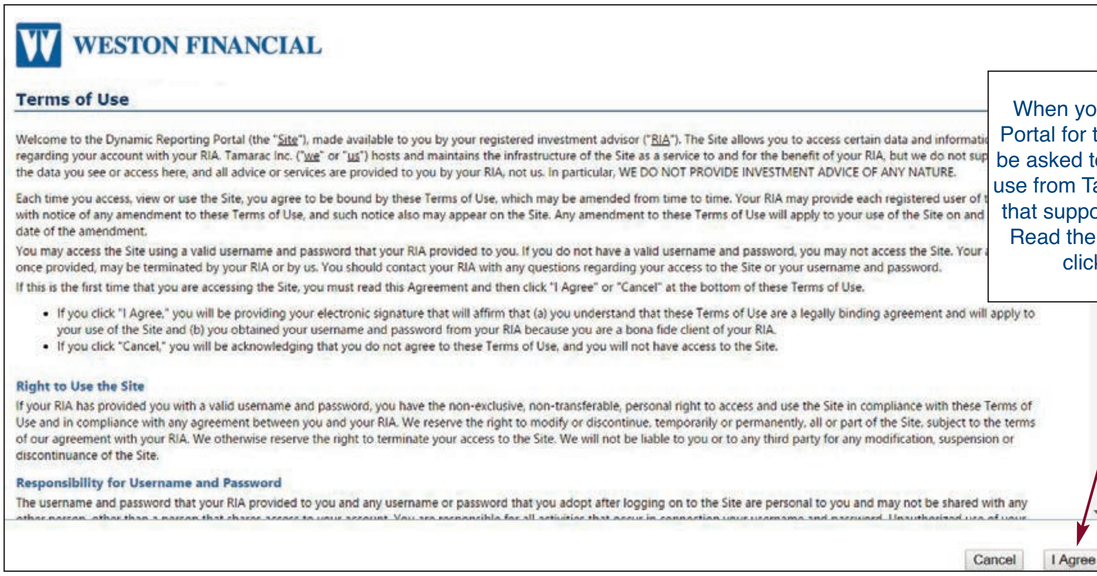
Terms of Use


WESTON FINANCIAL

Terms of Use

Welcome to the Dynamic Reporting Portal (the "Site"), made available to you by your registered investment advisor ("RIA"). The Site allows you to access certain data and informatic regarding your account with your RIA. Tamarac Inc. ("we" or "us") hosts and maintains the infrastructure of the Site as a service to and for the benefit of your RIA, but we do not sup the data you see or access here, and all advice or services are provided to you by your RIA, not us. In particular, WE DO NOT PROVIDE INVESTMENT ADVICE OF ANY NATURE.

Each time you access, view or use the Site, you agree to be bound by these Terms of Use, which may be amended from time to time. Your RIA may provide each registered user of t with notice of any amendment to these Terms of Use, and such notice also may appear on the Site. Any amendment to these Terms of Use will apply to your use of the Site on and date of the amendment.

You may access the Site using a valid username and password that your RIA provided to you. If you do not have a valid username and password, you may not access the Site. Your once provided, may be terminated by your RIA or by us. You should contact your RIA with any questions regarding your access to the Site or your username and password.

If this is the first time that you are accessing the Site, you must read this Agreement and then click "I Agree" or "Cancel" at the bottom of these Terms of Use.

- If you click "I Agree," you will be providing your electronic signature that will affirm that (a) you understand that these Terms of Use are a legally binding agreement and will apply to your use of the Site and (b) you obtained your username and password from your RIA because you are a bona fide client of your RIA.
- If you click "Cancel," you will be acknowledging that you do not agree to these Terms of Use, and you will not have access to the Site.

Right to Use the Site

If your RIA has provided you with a valid username and password, you have the non-exclusive, non-transferable, personal right to access and use the Site in compliance with these Terms of Use and in compliance with any agreement between you and your RIA. We reserve the right to modify or discontinue, temporarily or permanently, all or part of the Site, subject to the terms of our agreement with your RIA. We otherwise reserve the right to terminate your access to the Site. We will not be liable to you or to any third party for any modification, suspension or discontinuance of the Site.

Responsibility for Username and Password

The username and password that your RIA provided to you and any username or password that you adopt after logging on to the Site are personal to you and may not be shared with any

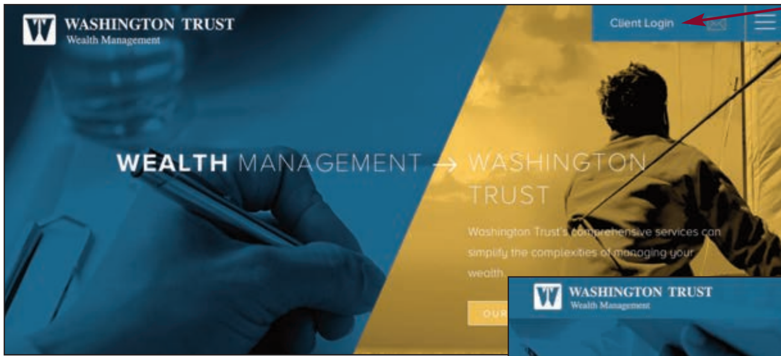
Cancel | I Agree

When you access the Client Portal for the first time, you will be asked to accept the terms of use from Tamarac, the company that supports the Client Portal. Read the Terms of Use, then click on "I Agree."

Website Log-In

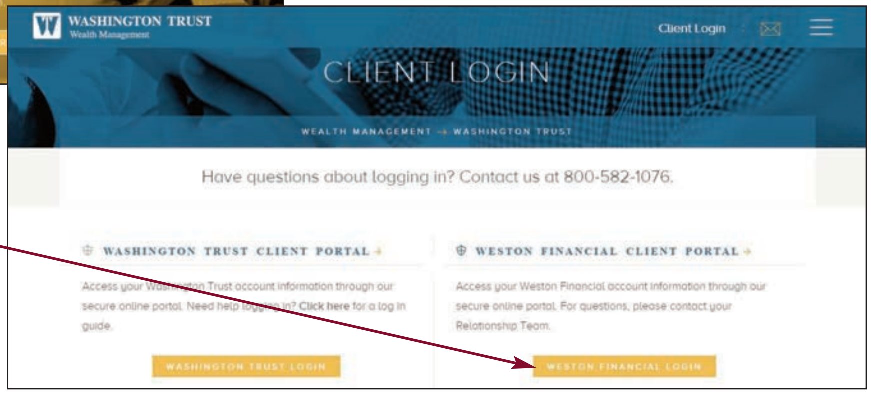
*Once you have completed the initial log-in process, you may access the **Client Portal** anytime though our enhanced website at **www.washtrustwealth.com or www.westonfinancial.net**.*

Home Page



Click here to access the Client Log-In Page

Client Login Page



Click here to access the Client Portal through our website

Data

Data will be refreshed daily, typically by 9:30am EST. The as-of date for data will be displayed in the upper right hand corner of the Client Portal. During the "Refresh" process, your Client Portal will be unavailable.

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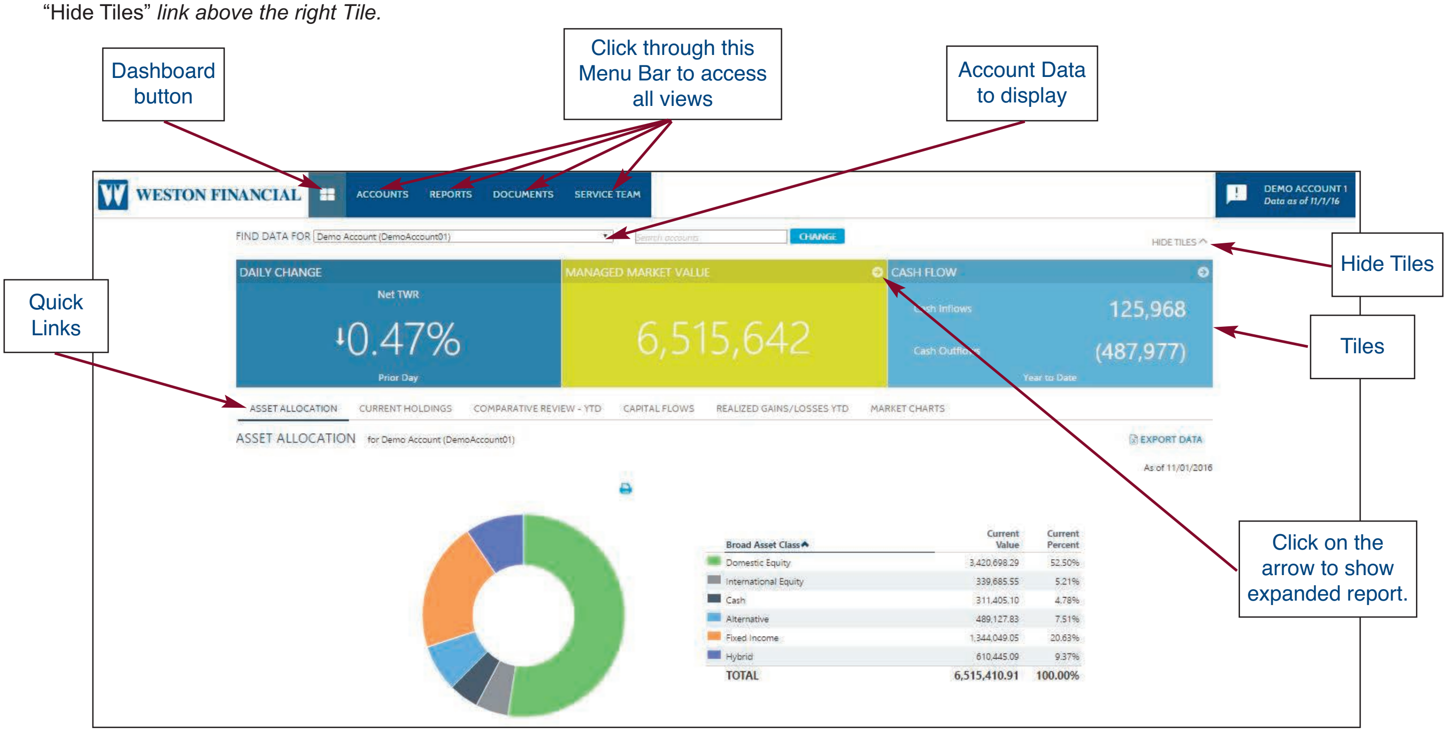
Dashboard

*Your **Dashboard** consists of a **Menu Bar** at the top; a search function for selecting data for one account or in aggregate; three **"Tiles"** with key financial metrics, and **Quick Links** to our most popular **Reports**; and an asset allocation wheel chart and table summary. You can expand the **Managed Market Value** and **Cash Flow Tiles** into detailed reports by clicking on the arrow icon in the upper right of the Tile or you can hide the Tiles by clicking on the* "Hide Tiles" *link above the right Tile.*



Menu Bar

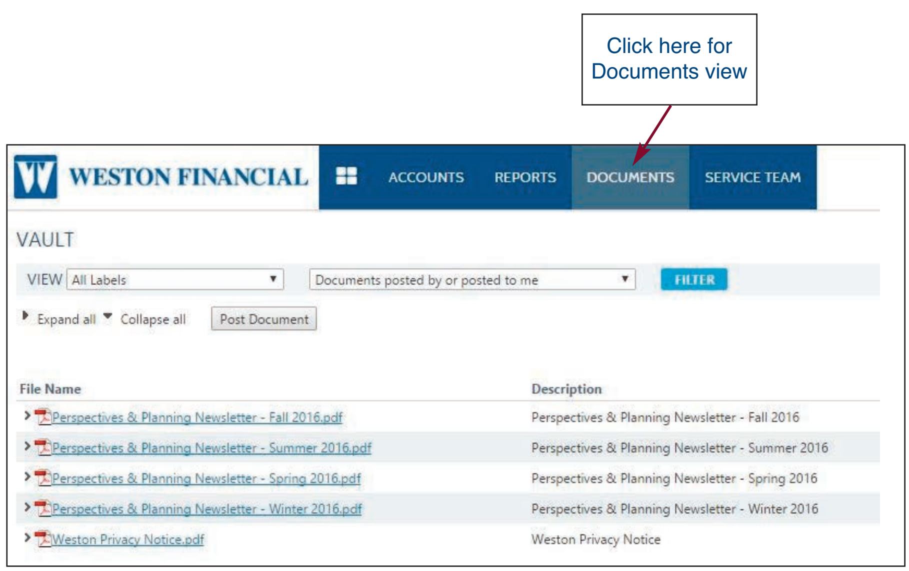
There are four tabs and a Dashboard Button at the top of the screen:

- ***Dashboard Button** - Returns you to your home page*
- ***Accounts** - Lists your accounts*
- ***Reports** - Displays all available reports individually*
- ***Documents** - Allows access to documents posted by your counselor, as well as those documents you post for your counselor*
- ***Service Team** - Provides contact information for your Weston Team*

Documents

*The **Documents tab** enables you to **view documents posted to you by your counselor**. You may also **post documents to your counselor**. For example: your counselor may post a document that requires your signature. You can open the document, sign it, and post it back to the Client Portal for your counselor to view.*

*Each quarter we will post our **Perspectives & Planning newsletter** on this tab for you to view, download, or print.*



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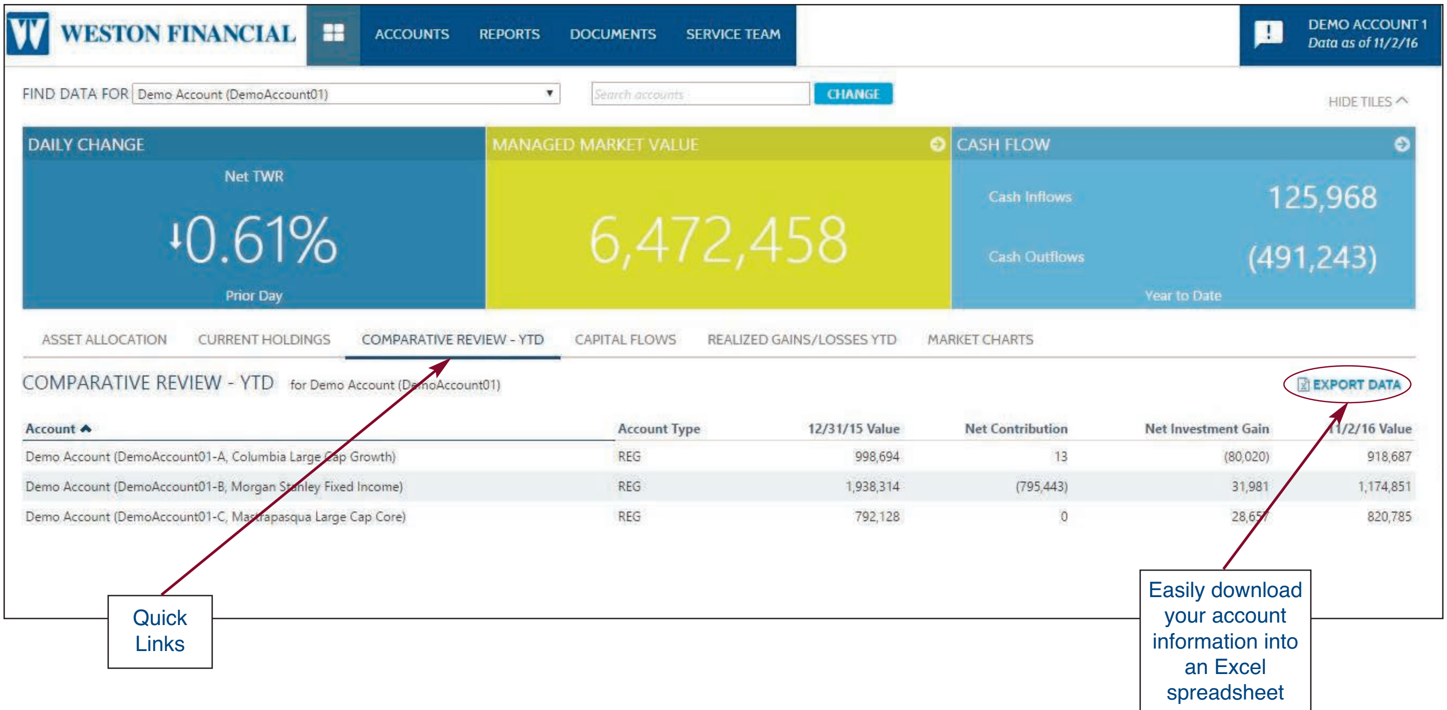
Quick Links to Reports

Navigate to detailed ***Reports*** *via the Reports tab on the Menu Bar or click on the Quick Links in the middle of the* ***Dashboard****. Below are examples of the* ***Comparative Review*** *and* ***Realized Gains/Losses*** *reports. You can export the data from all* ***Reports*** *to an Excel spreadsheet using the link at the top right of the Report. The* ***Market Charts*** *allows you to input a security symbol and obtain performance information for the security sources from* ***Google Finance.*** *Clicking on security symbols within Reports also takes you to Google Finance information.*

Comparative Review



Realized Gains/Losses