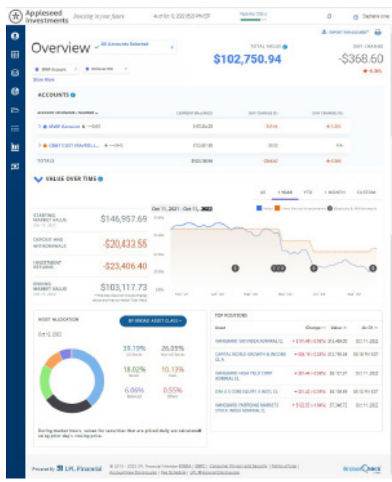
TECHNOLOGY

Secure Financial Account Access **Anytime, Anywhere, On Any Device**

With the convenience and security of Account View 2.0, you can access your most up-to-date account information from your desktop, mobile phone, or tablet with just the click of a button or tap of a finger.

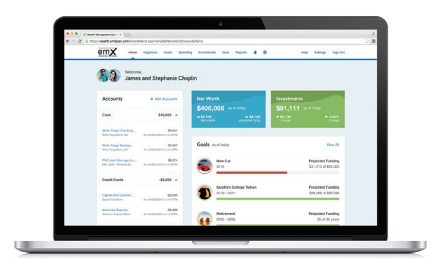


A note about security: LPL takes seriously the security and privacy of your information. Safeguarding data is our primary focus in the conception, design, and implementation of our platforms for you, like in Account View 2.0. Security is an evolving journey, and as cyber criminals change their tactics, we adapt and accelerate to stay one step ahead to protect you.

1. You can select a time frame over which to display account data .
2. Your total portfolio value and any changes in value that occurred during the day.
3. Monitor individual account balances, deposits, and withdrawals and investment returns.
4. Identify accounts easily: blue icon indicates LPL Financial account; orange icon indicates other non-LPL Financial accounts.
5. The ability to go paperless; mailings of statement and trade confirmations are eliminated.
6. Keep track of how your investments performed at a specific time, or over a period of time.
7. View the asset allocation pie chart to see how your assets are allotted.
8. View a snapshot of your top positions' recent performance.
9. Conduct a FINRA broker check at brokercheck.finra.org.

Take Control of Your Financial World

Your Personal Financial Management website makes it easy to manage both your wealth and your well-being by using **Wealth Design!**



Organize. Monitor. Collaborate.

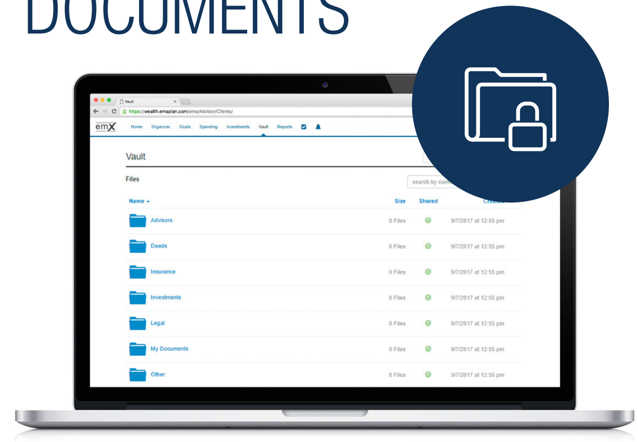
ORGANIZER
Connect all your accounts for a consolidated view of your entire financial picture.

INVESTMENTS
Interactive charts and detailed views help monitor all your accounts.

BUDGETING TOOLS
Set budgets to help reach your savings goals.

VAULT
Safely store your most important financial documents, accessible 24/7.

PROTECT YOUR IMPORTANT DOCUMENTS



With unlimited secure document storage, you can organize and protect your most important documents. Review the checklist below and start adding to your Vault today!

LEGAL DOCUMENTS

- ☐ Wills
- ☐ Deeds
- ☐ Revocable & Irrevocable Trusts
- ☐ Power of Attorney
- ☐ Codicils (Supplements made to a Will)
- ☐ Living Wills/Health Directives
- ☐ Prenuptial Agreements
- ☐ Buy/Sell Agreements
- ☐ Contracts

BENEFITS

- ☐ Social Security Info
- ☐ Veteran's Administration Info
- ☐ Employment Benefits

INSURANCE POLICIES

- ☐ (Life, LTD, Disability, Medical, Car, Property)

BANK & INVESTMENT STATEMENTS

- ☐ Pensions, IRAs, Annuities, etc.
- ☐ Investment Accounts
- ☐ Stock Options/Certificates

LIABILITIES

- ☐ List of Credit Cards with Contact Information
- ☐ Mortgages
- ☐ Loans

TAXES

- ☐ Tax Returns
- ☐ W-2 Forms

IDENTIFICATION

- ☐ Birth Certificates
- ☐ Drivers Licenses
- ☐ Passports
- ☐ Social Security Cards

FAMILY

- ☐ Adoption Papers
- ☐ Medical Records
- ☐ Marriage License
- ☐ Pictures
- ☐ Audio Files
- ☐ Video Clips

PROPERTY

- ☐ Titles to Homes, Autos, Boats, etc.
- ☐ Warranties

If you would like more information on the Account View OR Wealth Design Software, please contact us at 616.606.9100 or email info@ridgeinv.com

RIDGETOWN INVESTMENTS