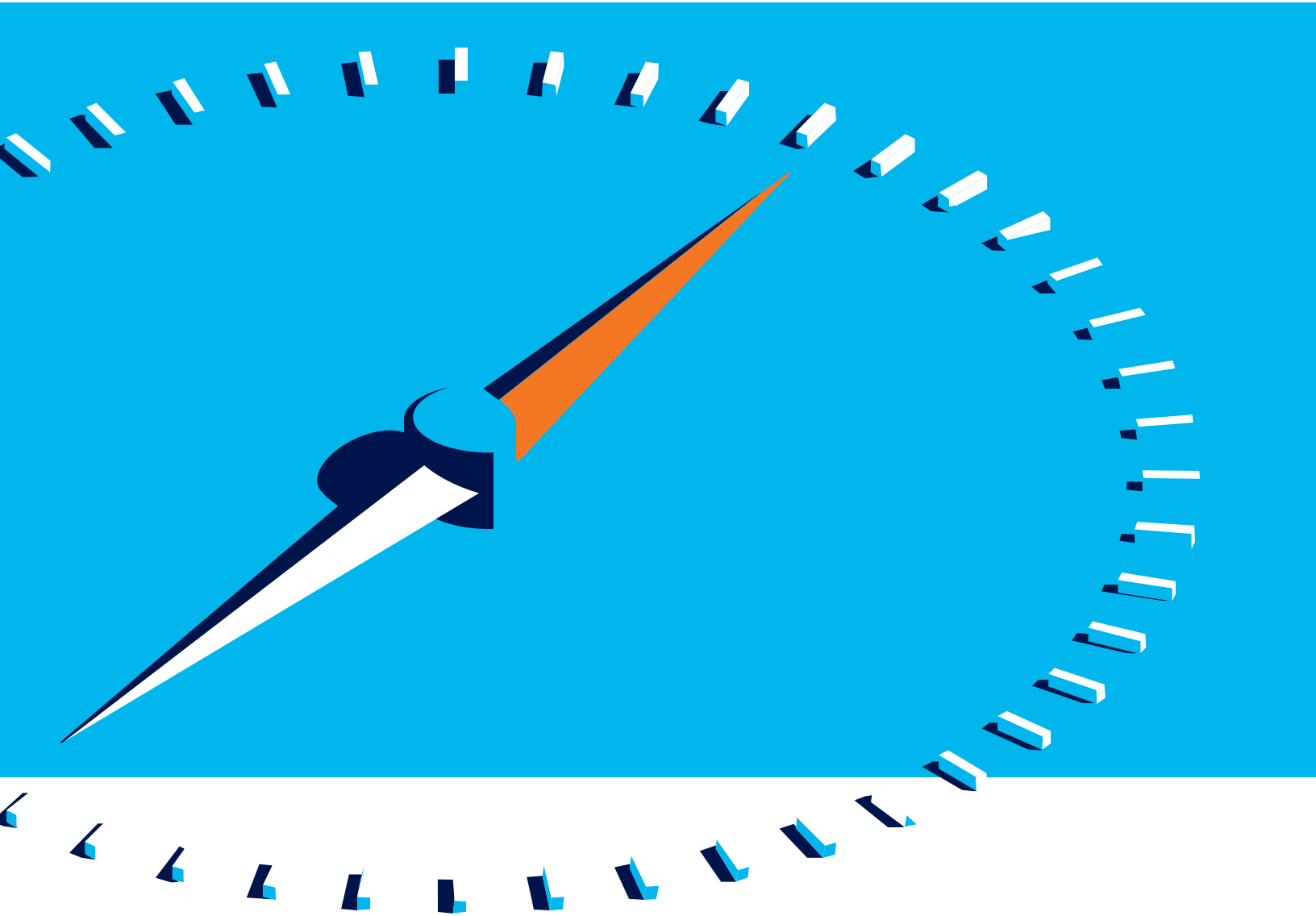
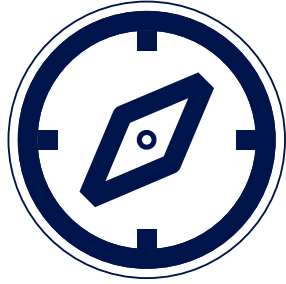


PLANNING YOUR FINANCIAL FUTURE

MANAGE YOUR LIFE
LESS, ENJOY IT MORE







MANAGE YOUR LIFE LESS, ENJOY IT MORE

The pace and complexity of managing finances today can leave some people feeling unprepared and uncertain about their financial future.

Our comprehensive financial planning can provide strategies that are customized to your objectives and capable of addressing a wide range of circumstances and concerns. We partner with you to put you in a better position to pursue your financial goals and aspirations. Our planning process will help you:

- Understand your finances from a holistic point of view.
- Create integrated strategies that take all your financial activities into account.
- Identify long-term goals and the steps needed to pursue them.
- Track your progress and make adjustments as you experience new life events.

We'll then use the WealthVisionSM platform to integrate your financial plan into a robust personal financial website. Its powerful engine can generate comprehensive financial planning analytics—calculating cash flow projections, modeling “what-if” scenarios, and generating alerts when adjustments may need to be made. You'll have access to budget tools, reports, educational materials, and storage for personal documents in one convenient and secure location.

YOUR PERSONAL FINANCIAL WEBSITE

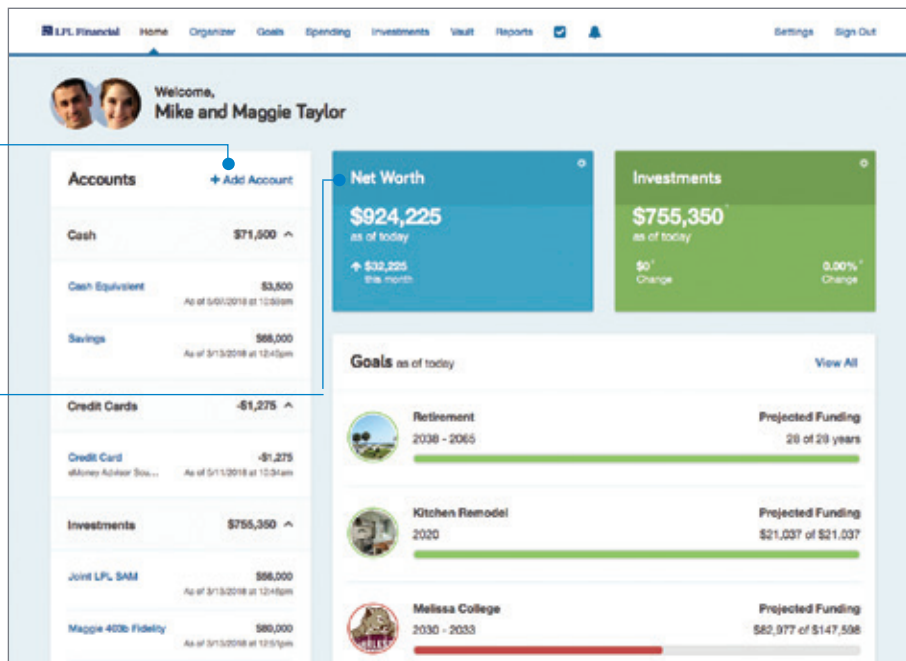


Financial Connections

Easily connect all of your accounts in one place.

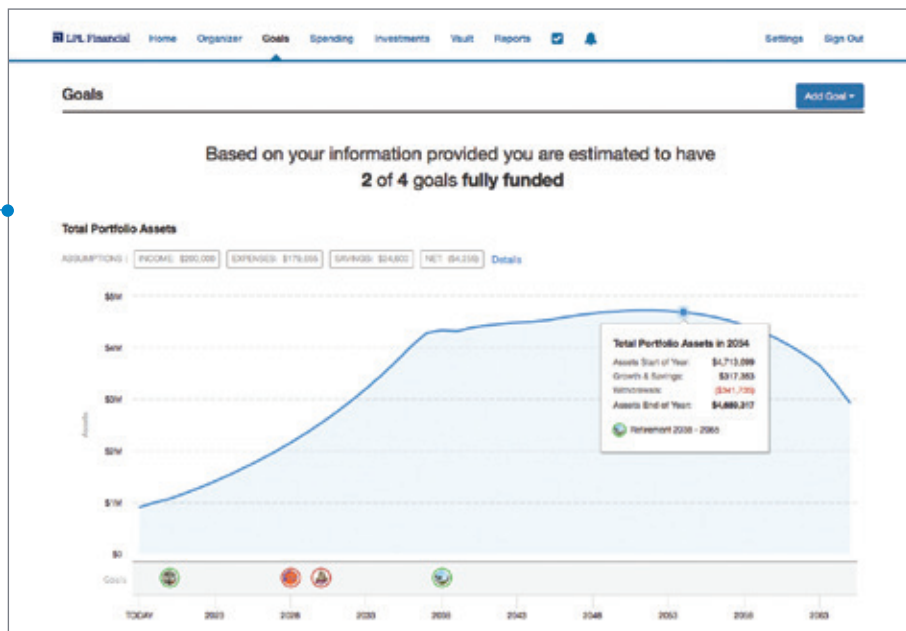
Interactive Design

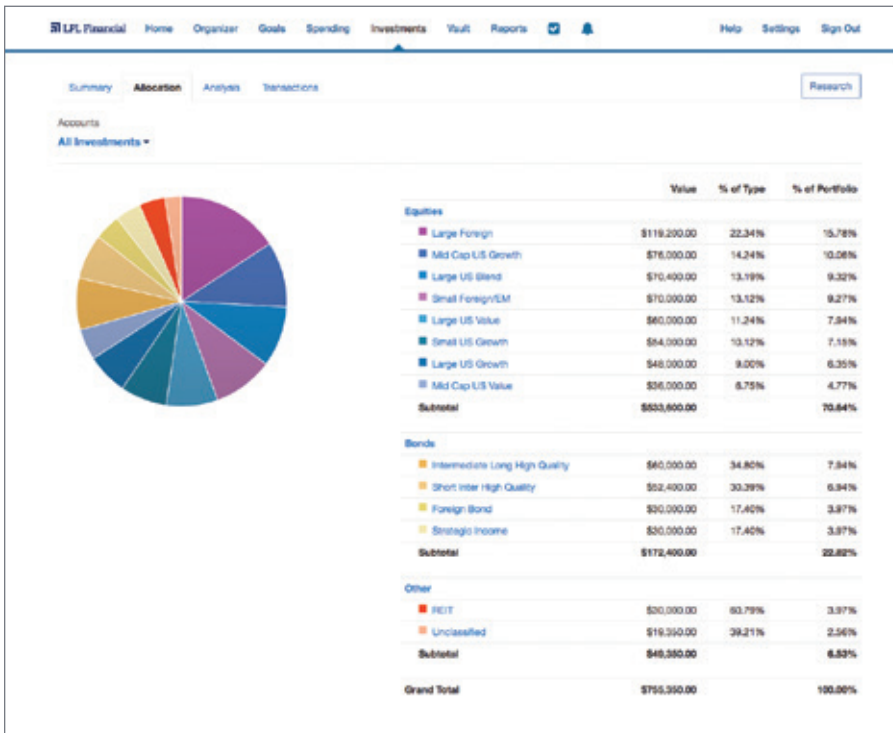
Your complete financial picture comes to life.



Goals

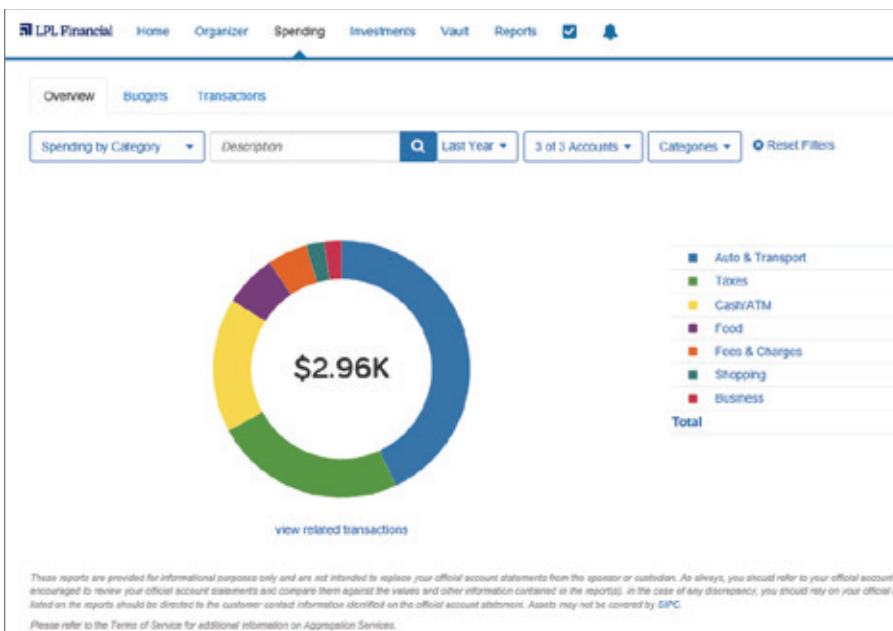
Track your progress toward various goals you would like to achieve.





Investments Page

Interactive charts and detailed views provide a clear picture of accounts.



Budgeting Tools

Bank and credit card transactions import so you can see what you're spending. You can also create custom categories to track where your money is going.

These reports are provided for informational purposes only and are not intended to replace your official account statements from the sponsor or custodian. As always, you should refer to your official account as encouraged to review your official account statements and compare them against the values and other information contained in the reports. In the case of any discrepancy, you should rely on your official as filed on the reports should be directed to the customer-contact information identified on the official account statement. Assets may not be covered by SIPC.

Please refer to the Terms of Service for additional information on Aggregation Services.

ROBUST FEATURES ON A SECURE, MOBILE PLATFORM

The WealthVision client portal is designed to provide you with the robust features you need to stay connected to your finances, goals, and important documents.



Your secure personal website is available via desktop or mobile, and it allows you to track your progress against the goals set by you and your financial professional. And, perhaps most importantly, you never have to worry about your information being shared with online advertisers and other service providers.

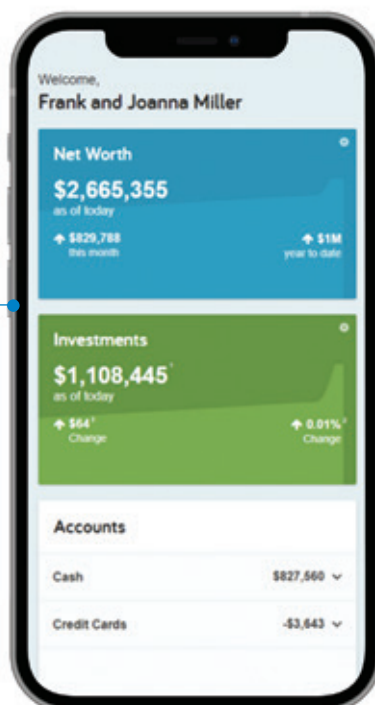
Your client portal provides you with:

- **Tracking of all net worth** with asset and liability balances updated daily
- **Alerts to keep you aware** of significant transactions and changes in balance
- **Investment analysis** on all of your investment assets
- **A budget tool** to track and prioritize your spending
- **Reports** on net worth, cash flow, asset allocation, and more



Mobile

You're just a click away from everything you need, whenever you want it, from wherever you are.



SIMPLIFY YOUR FINANCES, SPEND MORE TIME ON WHAT'S IMPORTANT

If you're looking to take the complexity out of managing your finances, it would be our pleasure to talk to you about how you can access your comprehensive financial picture today.

About LPL Financial

LPL Financial (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader* in the markets we serve, supporting more than 18,000 financial advisors, 800 institution-based investment programs and 450 independent RIA firms nationwide. We are steadfast in our commitment to the advisor-centered model and the belief that Americans deserve access to personalized guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients. For more information about LPL Financial, visit www.lpl.com.

*Top RIA custodian (Cerulli Associates, 2020 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S. (Based on total revenues, *Financial Planning* magazine, June 1996–2021); No. 1 provider of third-party brokerage services to banks and credit unions (2020–2021 Kehrer Bielan Research & Consulting Annual TPM Report)



IMPORTANT DISCLOSURES

There is no assurance that a comprehensive financial plan will yield positive outcomes. The purchase of certain securities will be required to effect some of the strategies. Investing involves risks, including possible loss of principal. **IMPORTANT: The projections or other information generated by WealthVision regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. Your results may vary with each use and over time.**

Securities and advisory services offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC). Insurance products are offered through LPL or its licensed affiliates. To the extent you are receiving investment advice from a separately registered independent investment advisor that is not an LPL Financial affiliate, please note LPL Financial makes no representation with respect to such entity.

Not Insured by FDIC/NCUA or Any Other Government Agency	Not Bank/Credit Union Guaranteed	Not Bank/Credit Union Deposits or Obligations	May Lose Value
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