WELCOME TO

Your Personal Financial Portal

First Merchants
Private Wealth Advisors
Helping you prosper

Personalized For You

From your portal, you have access to unique information and insights, account details, your investment dashboard, a document vault, instant access from any of your devices, and more.

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Stay Connected to Your Financial Picture

Home Page	At-a-glance view of pertinent account information
Portfolio	Dynamic view of your portfolio
Vault	Access to a document vault for reports and other communications
Login Questions	Helpful hints

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Home Page

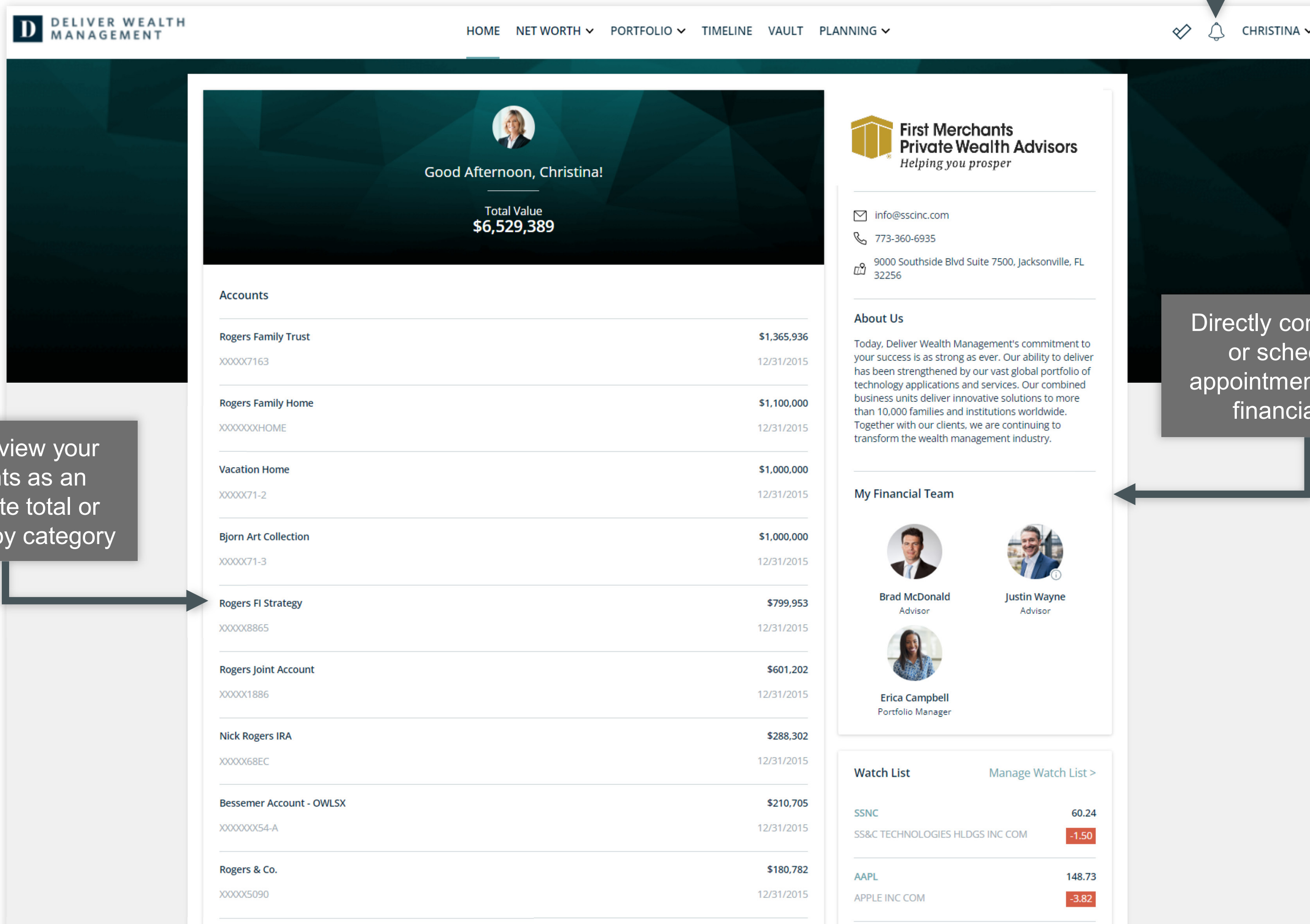
When you log in, you'll see your personalized home page. Across the top, you have quick access to the other pages of your portal.

Your accounts and total portfolio value are listed front and center. Next to your accounts, you'll also find your top holdings for quick reference.

You can stay connected to your financial team with clickable links to phone numbers, emails, and office locations. In addition to contacting us, we can send communications and updates from your team directly within the portal.

Home Page

View notifications from your advisor



Quickly view your accounts as an aggregate total or grouped by category

Directly communicate or schedule an appointment with your financial team

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My Accounts

HOME NET WORTH PORTFOLIO TIMELINE VAULT

Accounts

$5,017,475.46
Total Value

12 Accounts

0 Added Institutions

My Accounts: 12

Collapse All

Account Number	Account Name	Custodian	Value	As of Date	Last Updated
XXXXX2263	Rogers Family Trust	Fidelity IWS	1,497,107.51	12/31/2015	--
XXXXXXXHOME	Rogers Family Home	Manual Account	1,100,000.00	12/31/2015	--
XXXXX8865	Rogers FI Strategy	MorganStanley	799,952.63	12/31/2015	--
XXXXXX8-AI	BD Capital Partners	Alternative Investme...	756,440.72	12/31/2015	08/03/2015
XXXXX1886	Rogers Joint Account	Schwab PC	601,201.59	12/31/2015	--
XXXXX68EC	Nick Rogers IRA	National Financial	288,301.53	12/31/2015	--
XXXXX5090	Rogers & Co.	TD Ameritrade	180,782.31	12/31/2015	--
XXXXX1639	Rogers Irrevocable Trust	Pershing Advisory So...	149,083.21	12/31/2015	--
XXXXX6736	Rogers Individual	LPL Financial Accounts	49,901.19	12/31/2015	--
XXXXX9539	Rogers 529	Pershing Advisory So...	41,126.11	12/31/2015	--
XXXXXXXAMEX	Rogers American Express	Manual Account	-65,000.00	12/31/2015	--
XXXXXXXXXXXGAGE	Rogers Primary Mortgage	Alternative Investme...	-381,421.35	12/31/2015	--

Asset Name	Symbol	Value	Units @ price	Last Updated
Rogers Primary Mortgage	1388_ROGERS_MTGE	-381,421.35	-381,421 @ $1.00	12/31/2015

Click on accounts to view holding level detail

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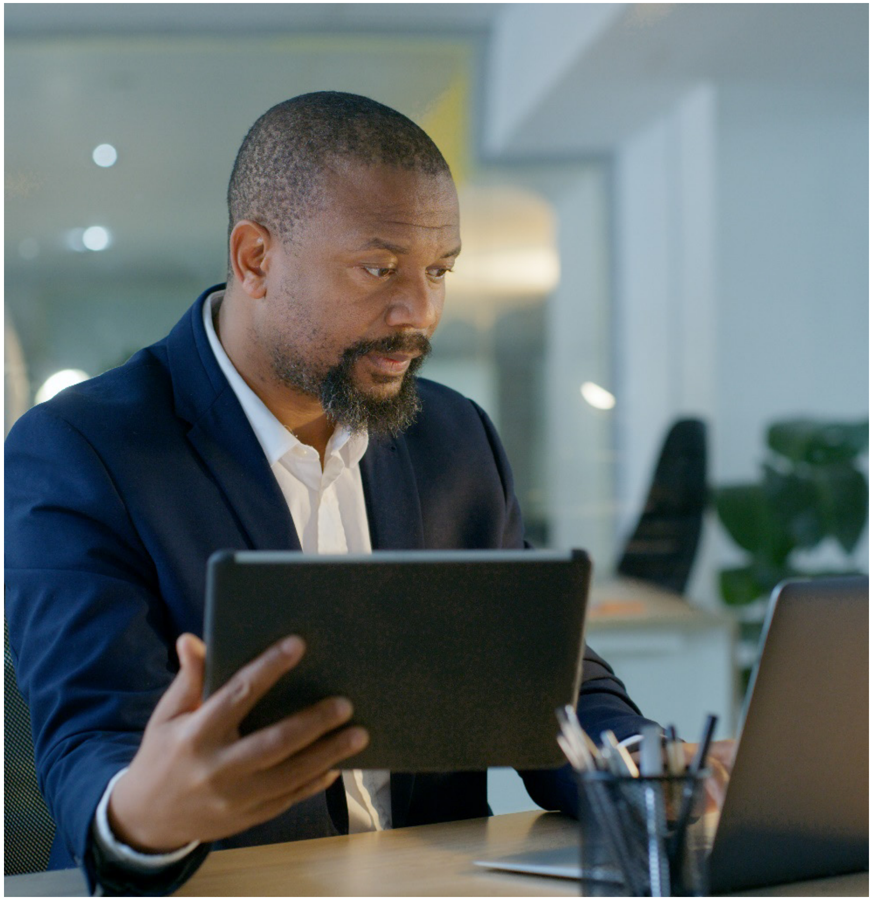
Portfolio

The Portfolio Dashboard is where you can view additional details about your portfolio. The dashboard gives you a dynamic overview of your portfolio with performance cards highlighting key information about your portfolio.

To get even more detail, you can click on the title of each card. You can also use the drop-down menu to quickly switch between the different cards.

All this information is customizable using the filters to select specific date ranges, portfolios, or accounts.



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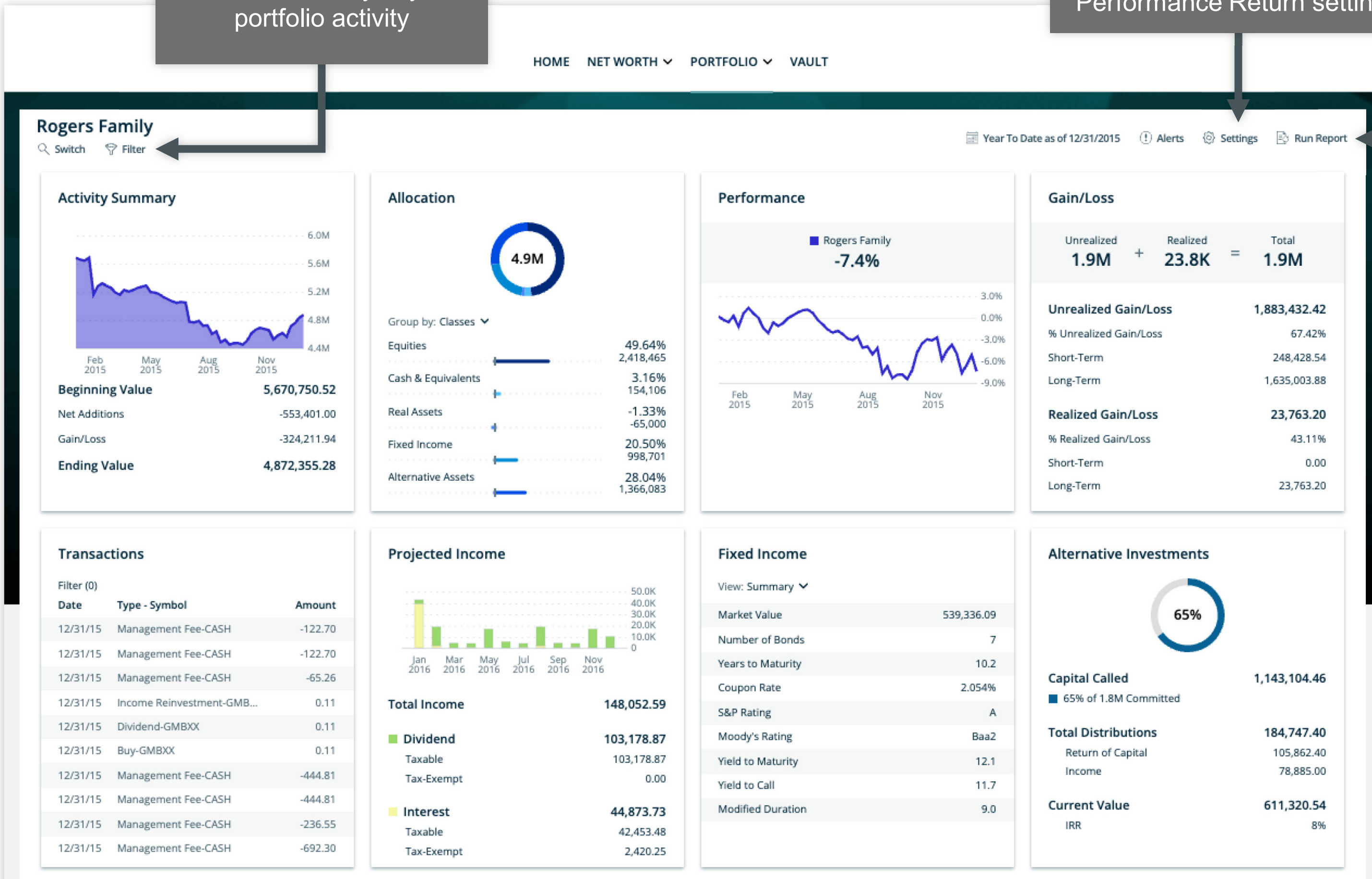
Portfolio

View a summary of your portfolio activity

Update Supervised and Performance Return settings

Run Reports directly from your portal



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Relationship Timeline

The Relationship Timeline is a consolidated, curated feed of posts designed to memorialize interactions between you and your team. Countless events and activities represent your financial life journey, and Timeline is a consolidated experience designed to capture this activity.

We view this as a great communication tool between you and your financial team.

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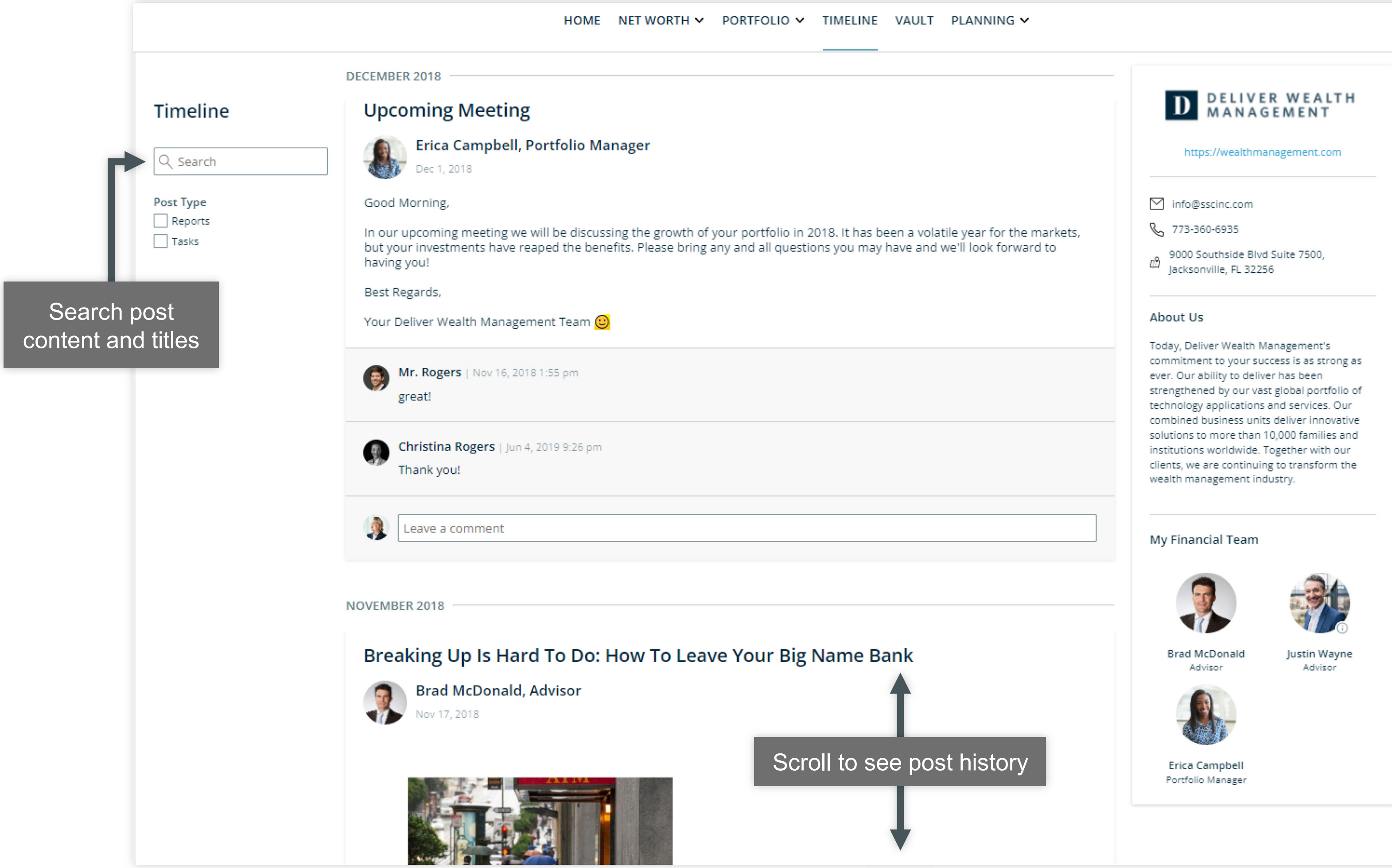
Relationship Timeline



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Vault

Securely sharing and managing documents is key to working with your wealth management team.

With the Vault page, documents can be organized into folders, drag-and-drop to upload new documents, and easily move files from one folder to another.

The Vault is also an area where we can share documents through the Shared Folders option.

From the Statements and Reports folders, you can view investment-focused reports created by your financial team.

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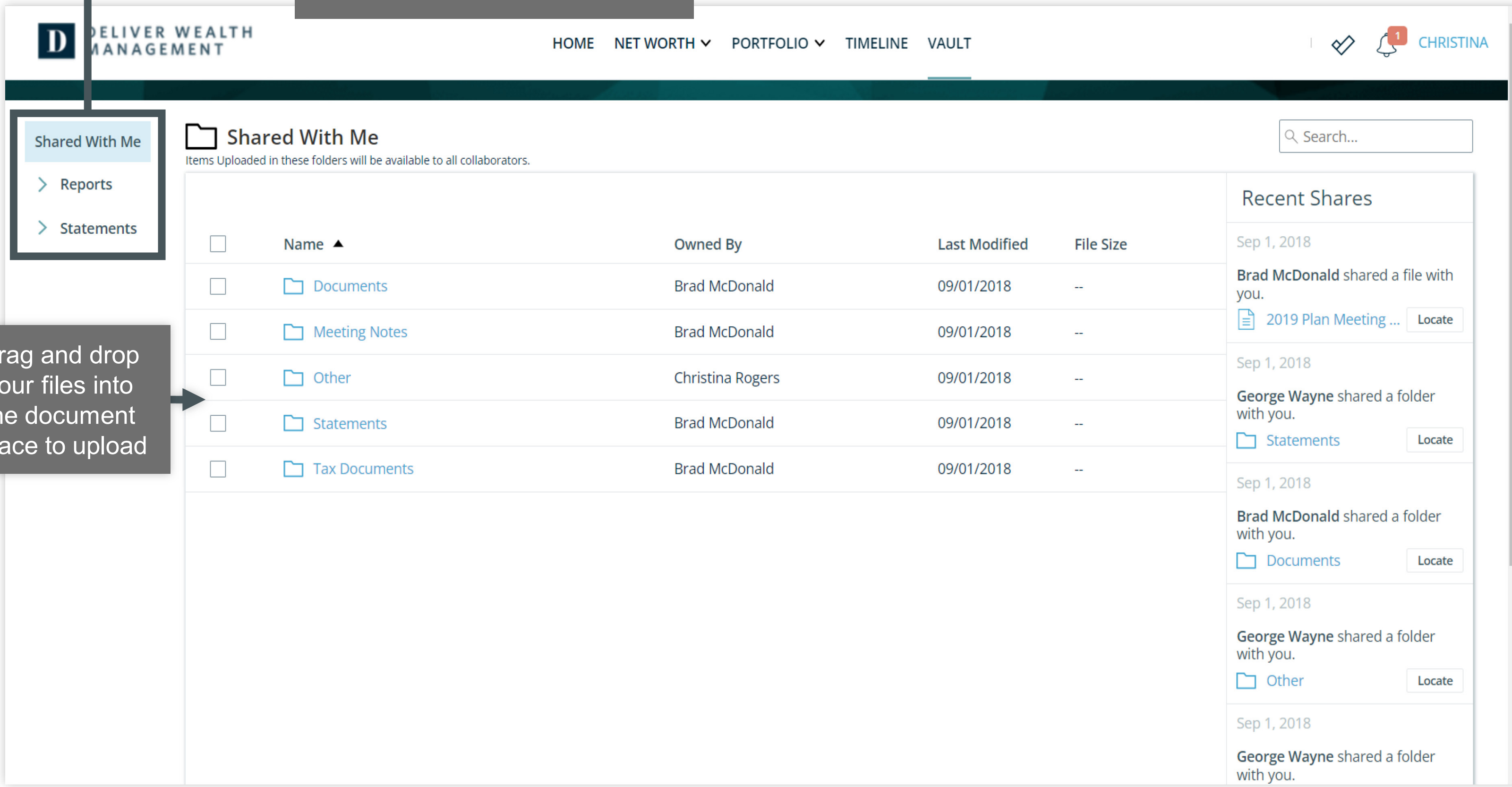
Vault

Securely store documents/files, share items with your financial team, view generated reports and custodial statements

Drag and drop your files into the document space to upload



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Login Assistance

Please follow these directions if you need help signing in to the site.

Username

Password

Sign In

Trouble Logging In?

Select "Trouble logging in?" on the sign-in page for help

You will receive an email with a link to access the site

Follow the steps provided to resolve login issues

Error! Invalid username and password combination.

Error! Your user account has been locked. Please click "Trouble logging in?" to unlock your account.

What's the problem?

I forgot my password.

I forgot my username.

I need to unlock my account.

Please use the link below to reset your password:

https://bd3.bdreporting.com/Auth/Default/ResetPassword/CtEU7X0gT0StVRValXJGdA

This is a temporary link and will expire in 7 days.

If you did not request this password reset, please contact your administrator.

Thanks,
Black Diamond

--- This is an auto generated email. Please do not reply. ---

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