Capital Investment Advisors

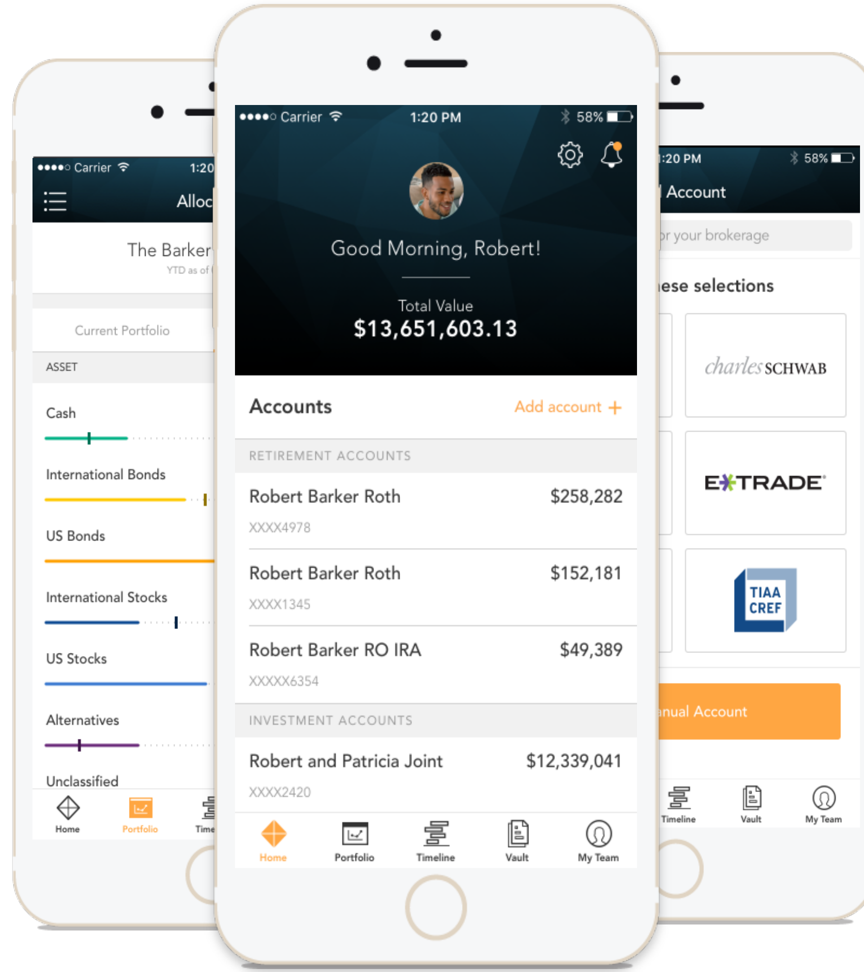
Your Financial Portal

Capital Investment Advisors

Portal Benefits

Why use the portal when I can obtain my account balances by logging into the custodian's site?

1. Access to your customized quarterly reports.
2. Easily share and/or store documents with personal information.
3. Familiarity: your advisor will use this same system during your portfolio reviews.
4. Access from any of your devices - computer, phone, or tablet!



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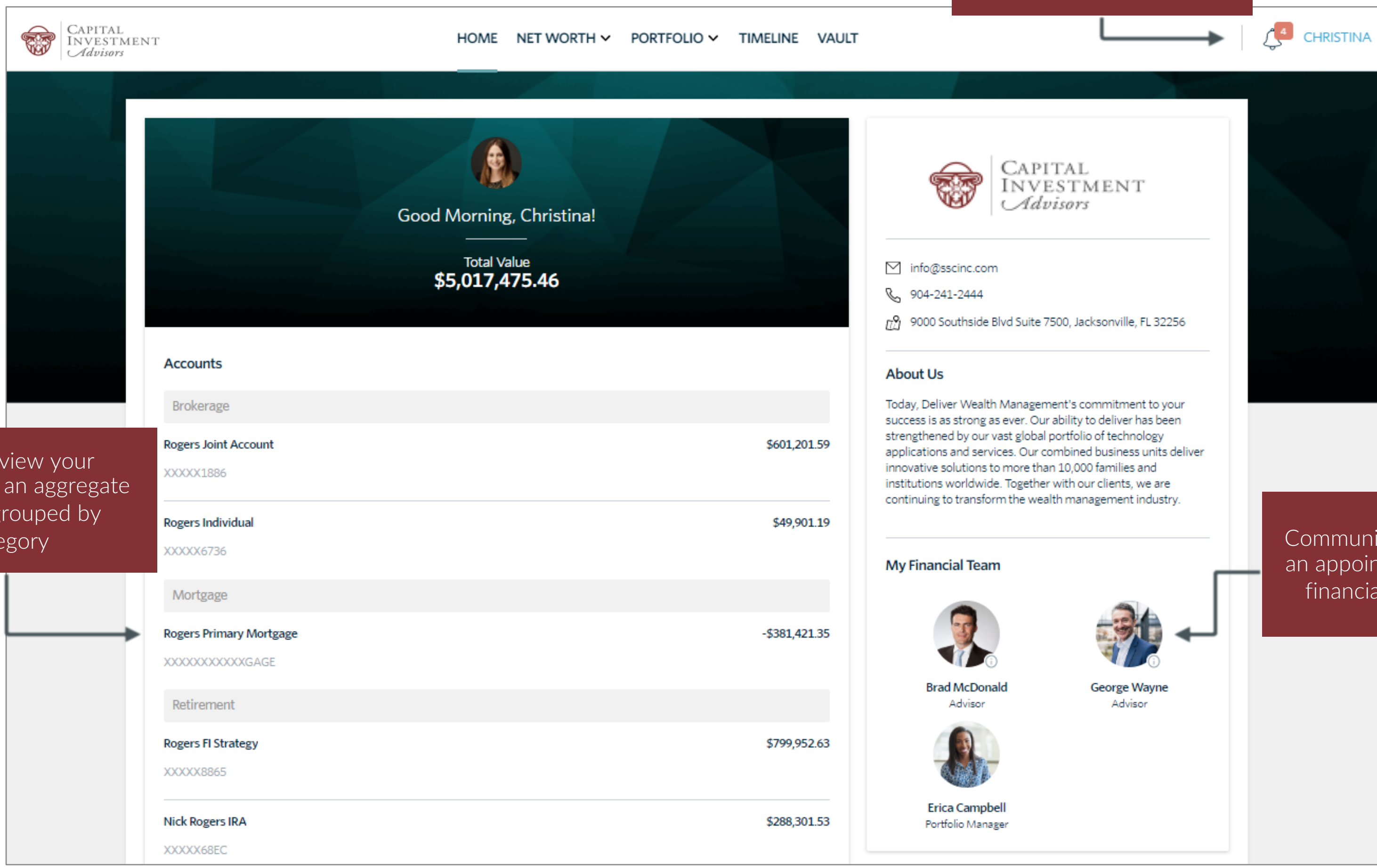
Home Page

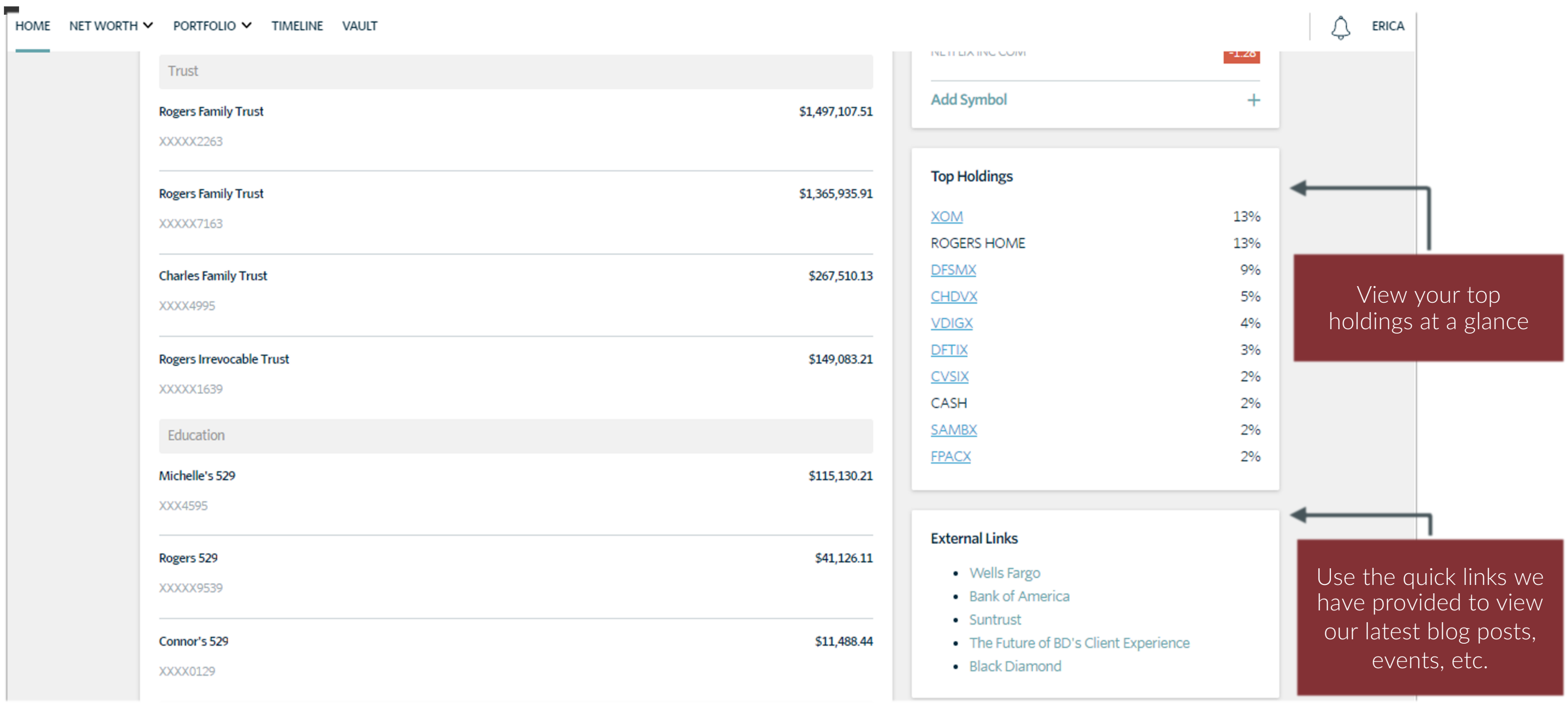
View notifications from your advisor



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

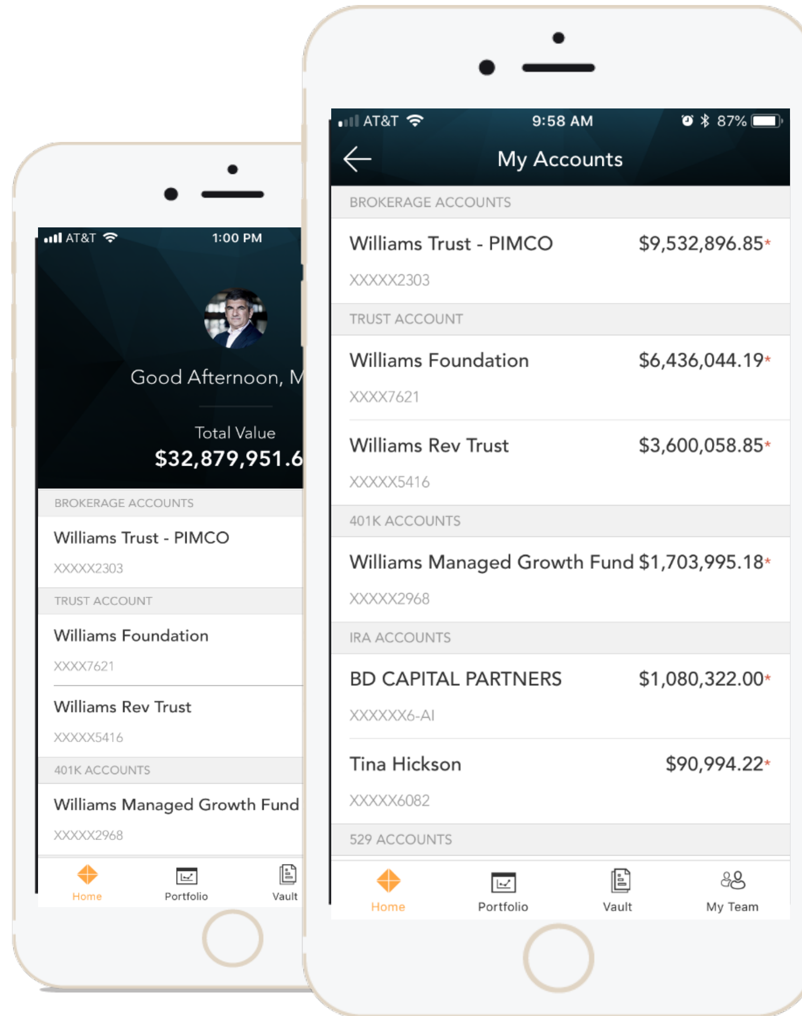
Communicate or schedule an appointment with your financial team directly

Home Page


HOME
NET WORTH
PORTFOLIO
TIMELINE
VAULT
ERICA
Trust
Rogers Family Trust $1,497,107.51
XXXXX2263
Rogers Family Trust $1,365,935.91
XXXXX7163
Charles Family Trust $267,510.13
XXXX4995
Rogers Irrevocable Trust $149,083.21
XXXXX1639
Education
Michelle's 529 $115,130.21
XXX4595
Rogers 529 $41,126.11
XXXXX9539
Connor's 529 $11,488.44
XXXX0129
Add Symbol
Top Holdings
XOM 13%
ROGERS HOME 13%
DFSMX 9%
CHDVX 5%
VDIGX 4%
DFTIX 3%
CVSIX 2%
CASH 2%
SAMBX 2%
FPACX 2%
External Links
Wells Fargo
Bank of America
Suntrust
The Future of BD's Client Experience
Black Diamond
View your top holdings at a glance
Use the quick links we have provided to view our latest blog posts, events, etc.

Net Worth

Within the Net Worth space, the My Accounts page provides a detailed list of your accounts managed at Capital Investment Advisors. Balances and statuses are visible at a glance. You can expand each account to see your holdings and their individual values.



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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

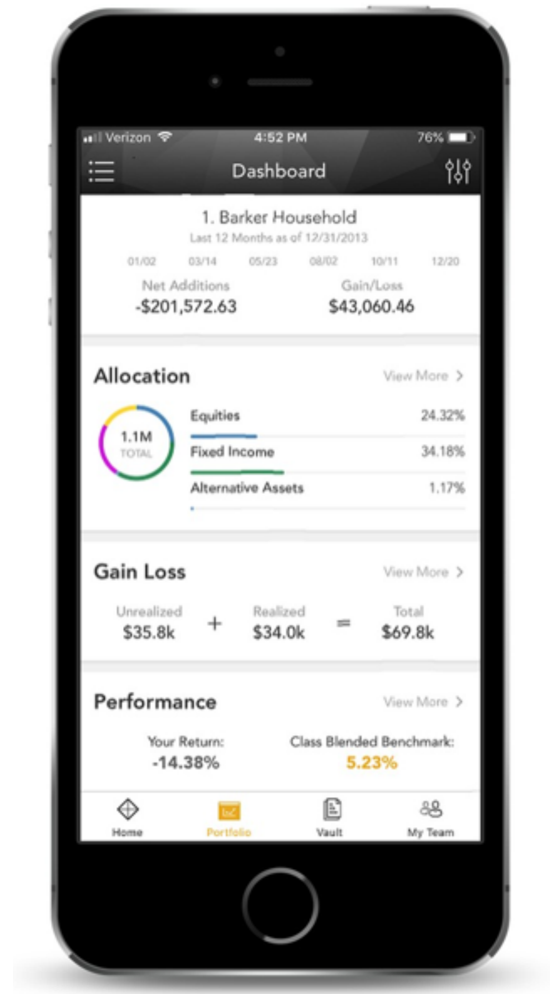
Click on accounts to view holding level detail

Portfolio

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

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

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



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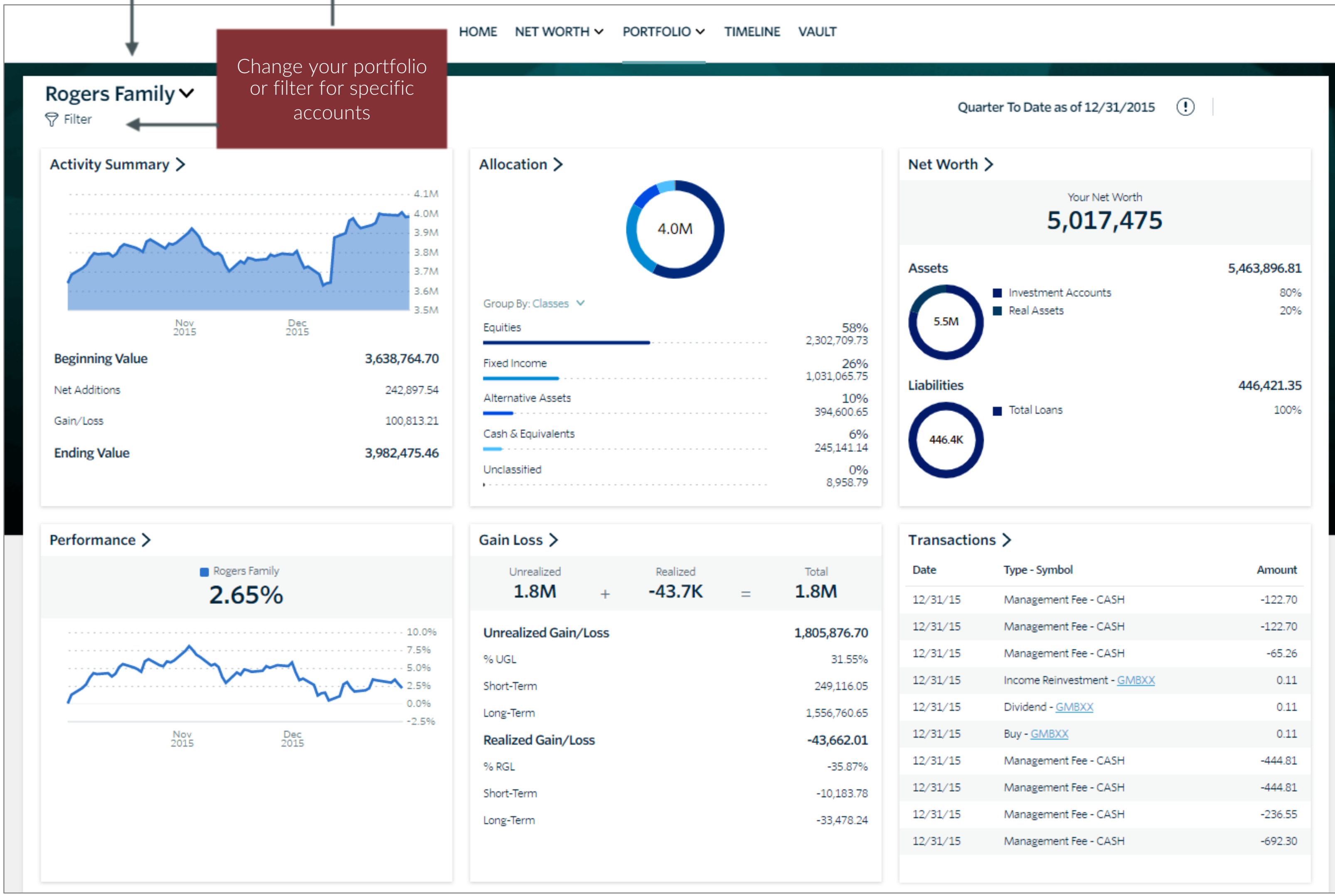
Portfolio



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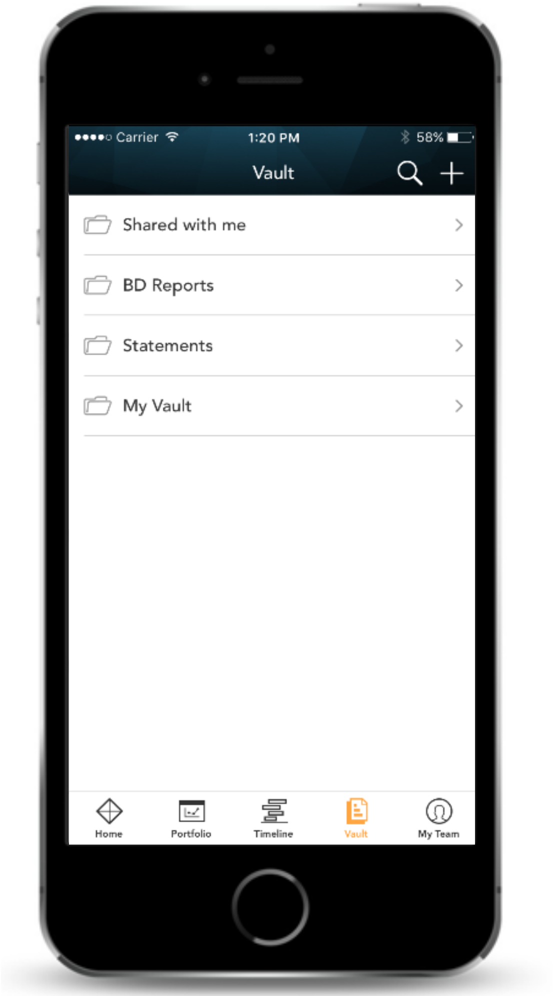
Vault

Securely sharing and managing documents is key to working with your wealth management team. The Vault page is where you can keep track of all your important financial and legal documents.

From here, you can organize your documents 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 with each other through the Shared Folders option.

From the Statements and Reports folders, you have quick access to view investment-focused reports created by your financial team.

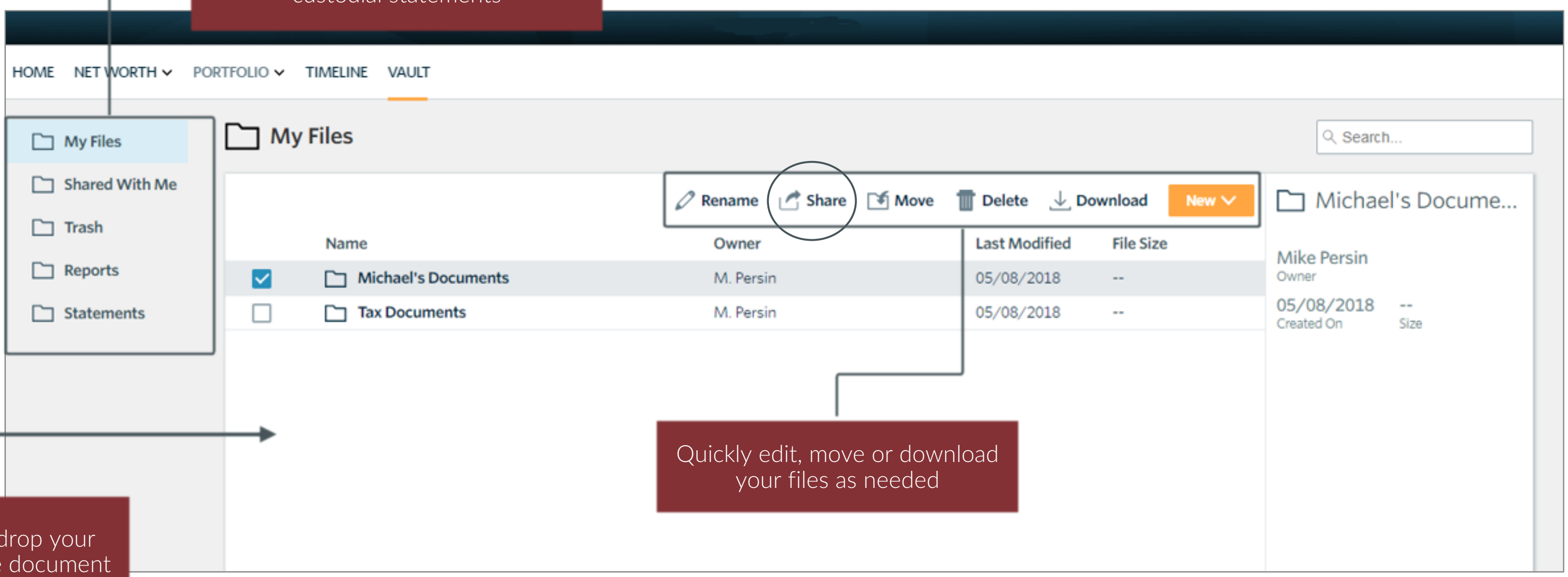


Vault

→ If you upload a document to your vault, only you have access to the document unless you share it.

→ If you would like to securely share a document with us, please click Share and select BOTH your advisor and CSA/M.

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

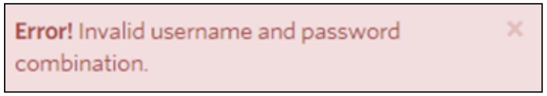


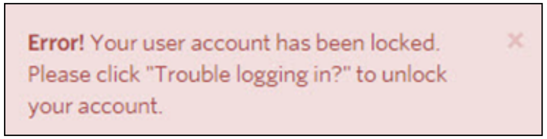
Quickly edit, move or download your files as needed

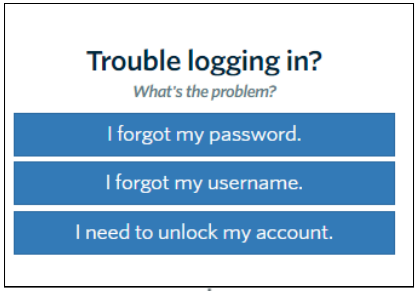
Drag-and-drop your files into the document space to upload

Login Problems

How to access your account if you have trouble signing into the site.



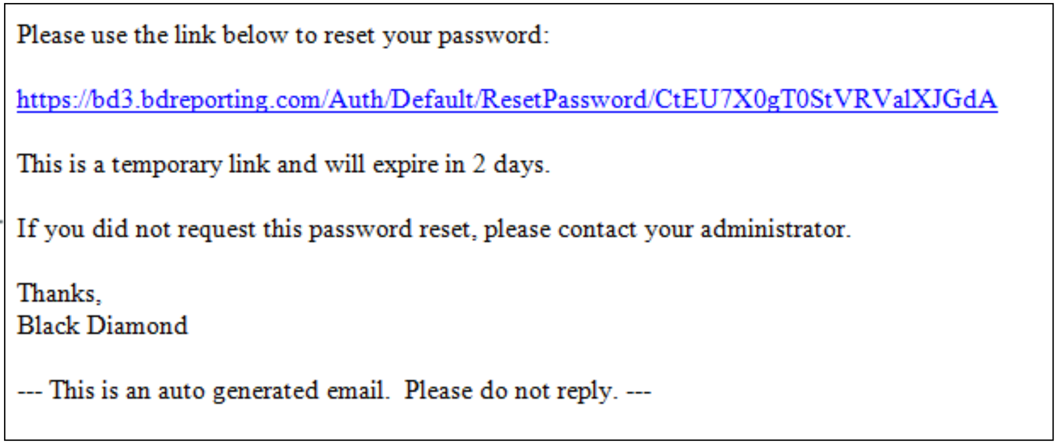




Select "Trouble Logging In?" on the sign-in page for help

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

Follow the steps provided to resolve login issues



Please use the link below to reset your password:

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

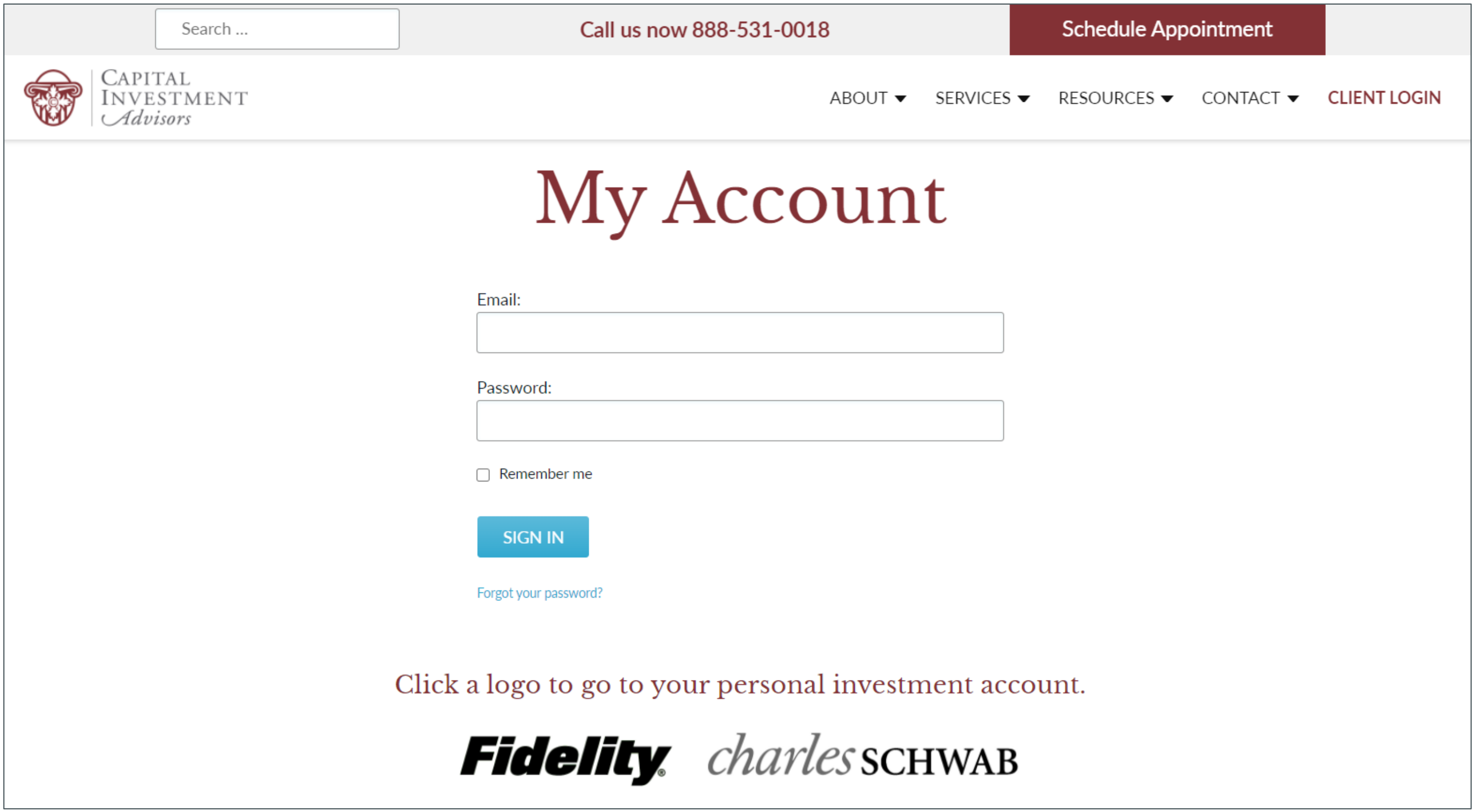
This is a temporary link and will expire in 2 days.

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. ---

For quick access to your portal, simply visit our website www.yourwealth.com and click "Client Login" on the top right. The following screen will prompt you to enter your email address and password. Once you click "Sign In", you will be taken directly to your client portal.



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