

Capital Investment Advisors

Your Financial Portal

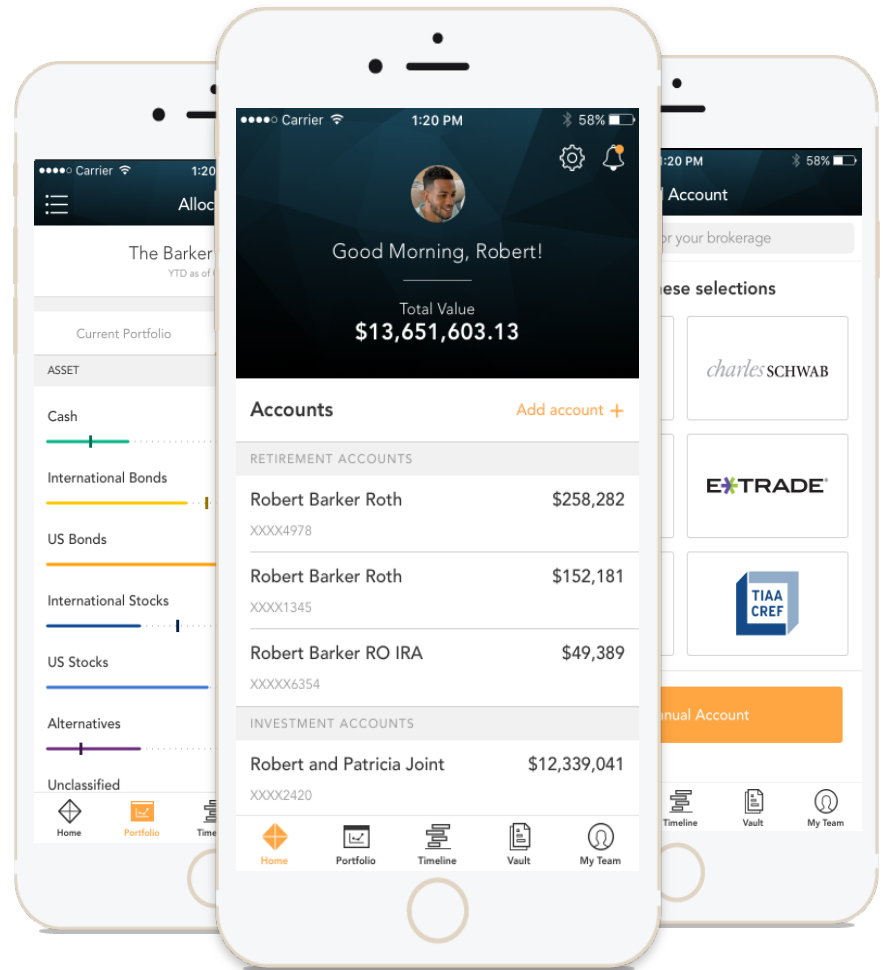


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Portal Benefits

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!



Home Page

View notifications from
your advisor

The screenshot shows the home page of the Capital Investment Advisors client portal. At the top, a navigation bar includes links for HOME, NET WORTH, PORTFOLIO, TIMELINE, and VAULT. On the right, a user profile for Christina is shown with a notification bell icon. The main content area features a personalized greeting, 'Good Morning, Christina!', and a total net worth of \$5,017,475.46. Below this, there are sections for 'Accounts' (Brokerage, Mortgage, Retirement) and 'My Financial Team' (Brad McDonald, George Wayne, Erica Campbell). A sidebar on the right contains contact information and an 'About Us' section.

Accounts

Account Name	Balance
Brokerage	
Rogers Joint Account	\$601,201.59
Rogers Individual	\$49,901.19
Mortgage	
Rogers Primary Mortgage	-\$381,421.35
Retirement	
Rogers FI Strategy	\$799,952.63
Nick Rogers IRA	\$288,301.53

My Financial Team

- Brad McDonald
Advisor
- George Wayne
Advisor
- Erica Campbell
Portfolio Manager

Contact Information:

- info@sscinc.com
- 904-241-2444
- 9000 Southside Blvd Suite 7500, Jacksonville, FL 32256

About Us:

Today, Deliver Wealth Management's commitment to your success is as strong as ever. Our ability to deliver has been strengthened by our vast global portfolio of technology applications and services. Our combined business units deliver innovative solutions to more than 10,000 families and institutions worldwide. Together with our clients, we are continuing to transform the wealth management industry.

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

Trust

Rogers Family Trust	\$1,497,107.51
XXXXX2263	
Rogers Family Trust	\$1,365,935.91
XXXXX7163	
Charles Family Trust	\$267,510.13
XXXXX4995	
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
XXXXX0129	

NET DATA.COM

11:20

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

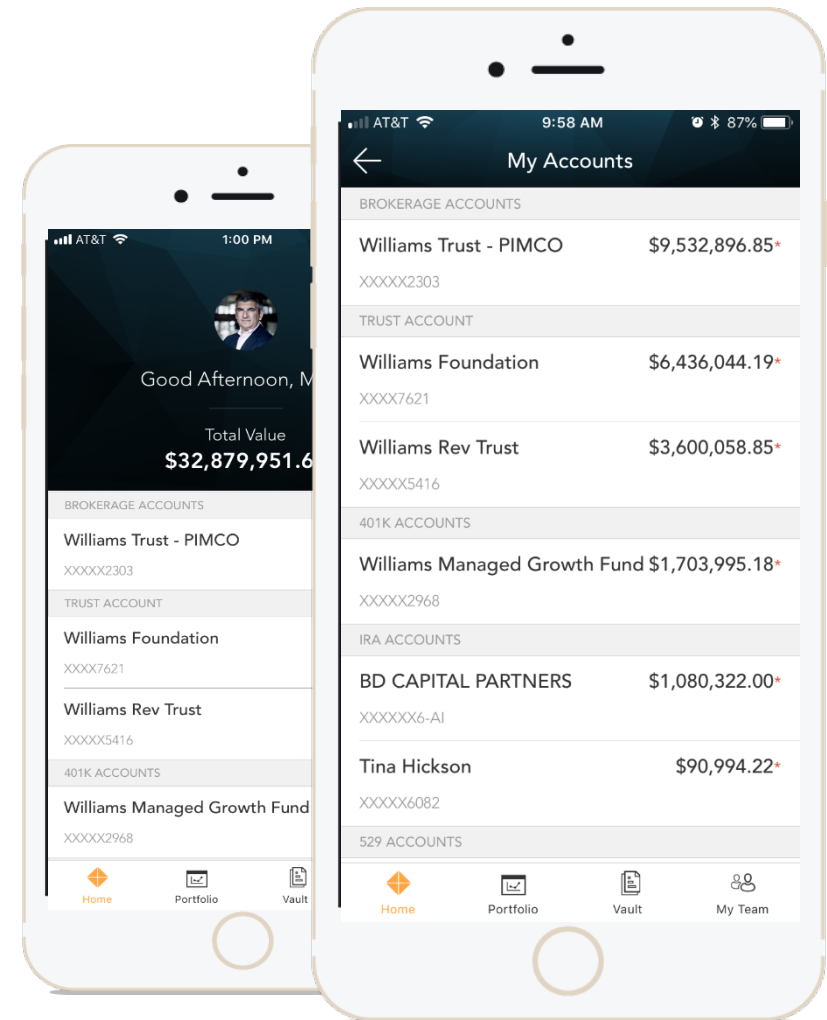
View your top holdings at a glance

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.



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	--
> XXXXXXHOME	Rogers Family Home	Manual Account	1,100,000.00	12/31/2015	--
> XXXXX8865	Rogers FI Strategy	MorganStanley	799,952.63	12/31/2015	--
> XXXXX8-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	--
> XXXXXXAMEX	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



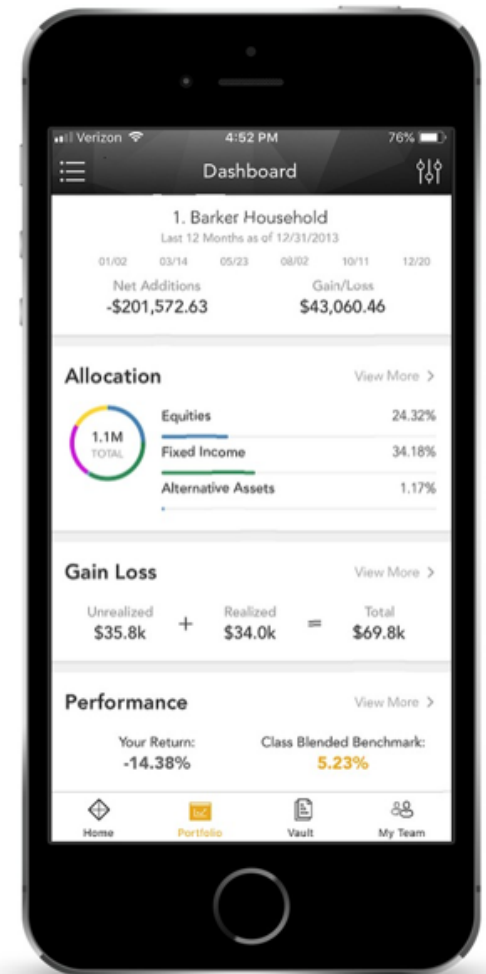
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Portfolio

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

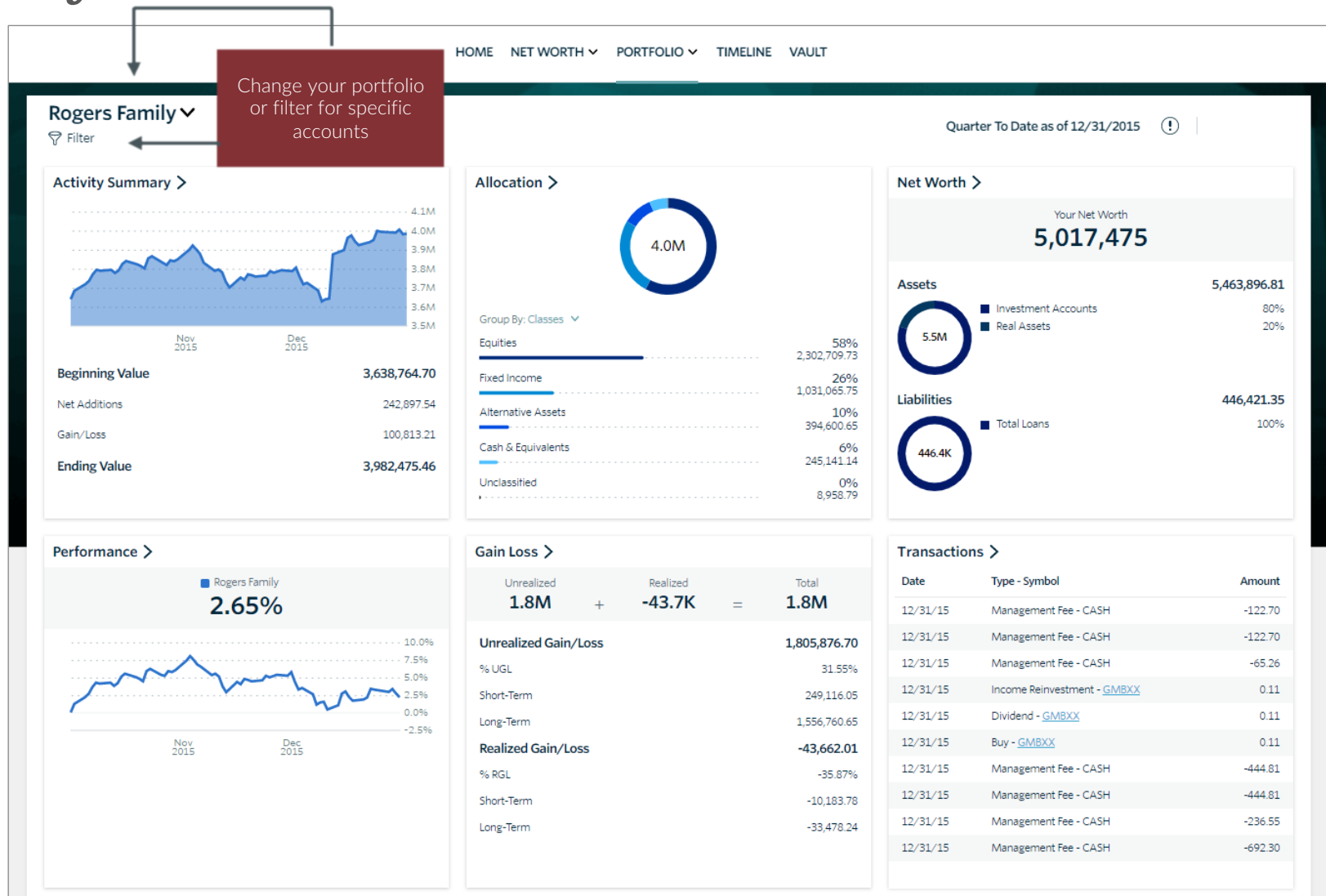
To get even more detail, you can click on the title of each card. You can also use the drop-down menu to switch between the different cards quickly.

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



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Portfolio



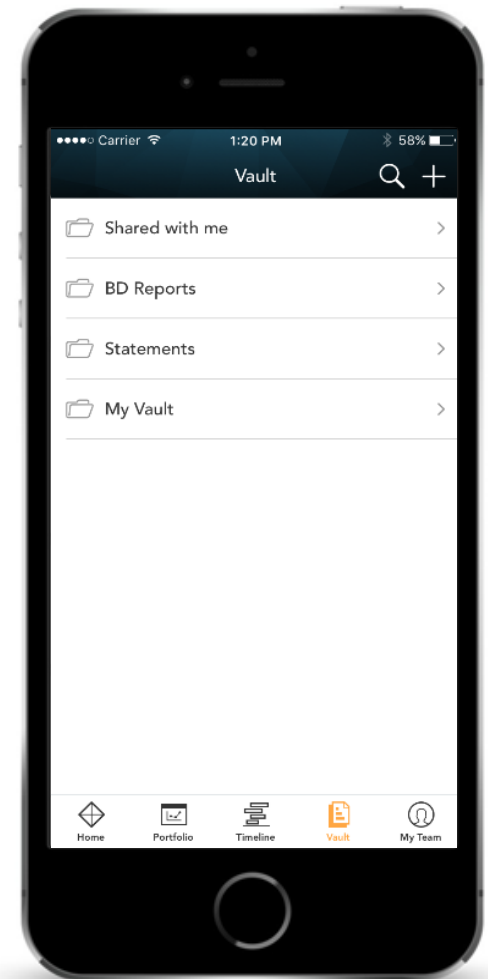
Vault

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.



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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

The screenshot displays the 'Vault' section of a financial software interface. At the top, a navigation bar includes 'HOME', 'NET WORTH', 'PORTFOLIO', 'TIMELINE', and 'VAULT'. Below this, a sidebar on the left lists 'My Files', 'Shared With Me', 'Trash', 'Reports', and 'Statements'. The main area is titled 'My Files' and contains a table of documents. Above the table is a toolbar with icons for 'Rename', 'Share' (circled), 'Move', 'Delete', 'Download', and a 'New' button. The table has columns for 'Name', 'Owner', 'Last Modified', and 'File Size'. Two documents are listed: 'Michael's Documents' and 'Tax Documents', both owned by 'M. Persin' and last modified on '05/08/2018'. To the right of the table, a detailed view for 'Michael's Documents' shows the owner 'Mike Persin' and the creation date '05/08/2018'. A search bar is located in the top right corner.

Name	Owner	Last Modified	File Size
<input checked="" type="checkbox"/> Michael's Documents	M. Persin	05/08/2018	--
<input type="checkbox"/> Tax Documents	M. Persin	05/08/2018	--

Michael's Documents

Mike Persin
Owner
05/08/2018
Created On

--
Size

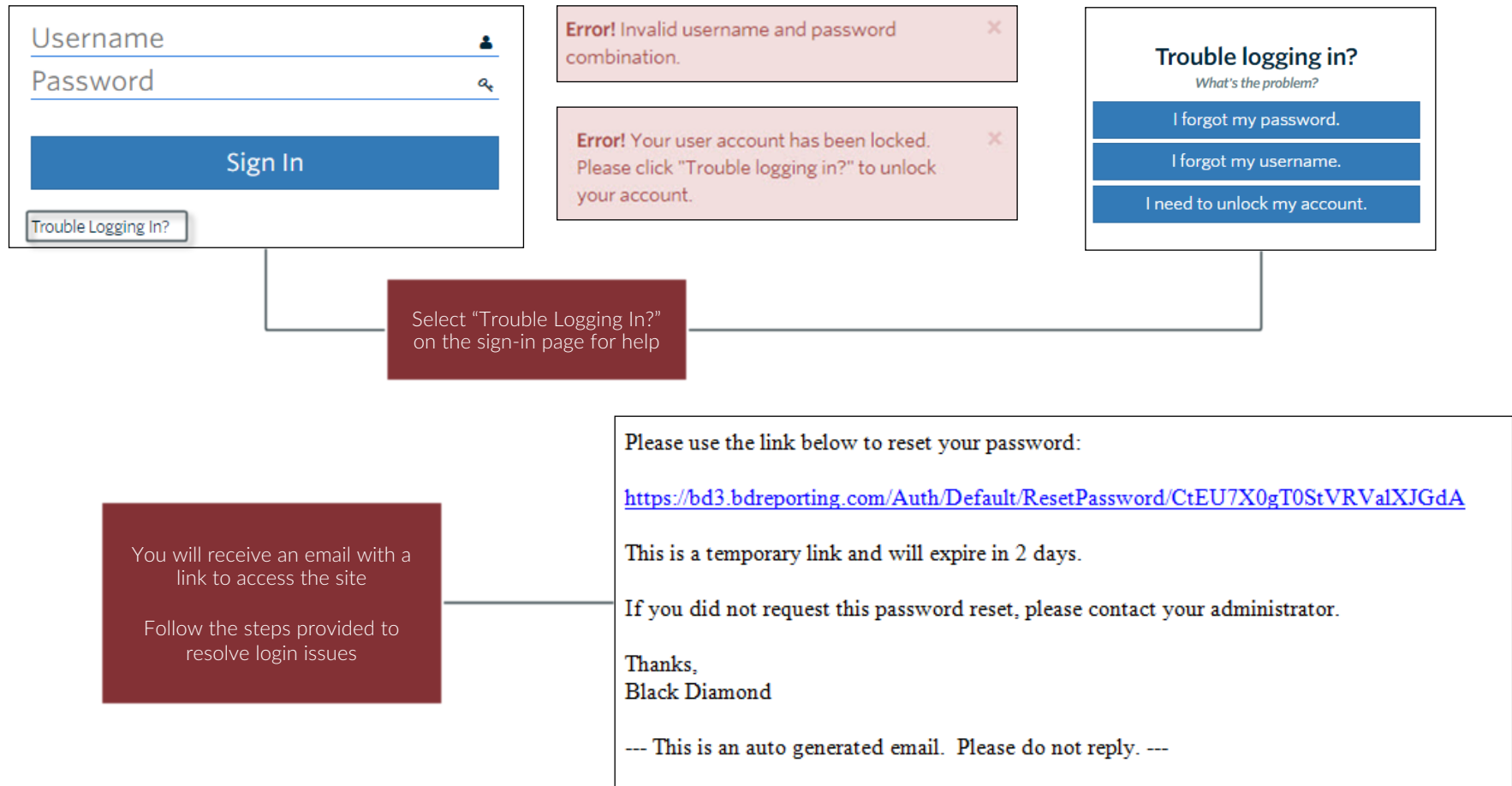
Quickly edit, move or download your files as needed

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.



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.

Call us now 888-531-0018

Schedule Appointment

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ABOUT ▼ SERVICES ▼ RESOURCES ▼ CONTACT ▼ CLIENT LOGIN

My Account

Email:

Password:

☐ Remember me

SIGN IN

[Forgot your password?](#)

Click a logo to go to your personal investment account.

Fidelity *charles* SCHWAB