PRACTICAL PLANNING:

Tamarac Client Portal:

An overview of your online portal



Your Tamarac online portal allows you to access real-time data about your portfolio, including up-to-date investment returns, a variety of reporting tools, performance analytics, and document management. Here, we share some of the features and functionalities so you know what you have at your fingertips.

ACCESS YOUR PORTAL

To log in to your portal — or to reset your password — go to www.arnerichmassena.com and click the CLIENT LOG-IN button in the upper right-hand corner of the home page. Your username is your main contact email address. Follow the prompts to reset your password.

In addition to the online portal, you can download the app for your mobile phone or tablet from the app store. Use the client portal code "ArnerichMassena" together with your login information to access your accounts.

VIEWING YOUR PORTFOLIO

You can view each account individually or all accounts grouped together. Be aware that Tamarac defaults to grouping all assets, but you can view individual accounts by selecting the one you want to see in the "FIND DATA FOR" drop-down menu in the top left corner of your dashboard.

UNDERSTANDING THE BASICS

As in your performance reports, all returns shown on your portal are time-weighted returns, net of all fees. Your dash-board is designed to provide easy access to the most useful information. You'll see four tiles:

- Total assets: Total assets for the account selected
- Account summary: starting value, net flows, investment gain, and ending value for the time period selected.
- **Investment gain:** Dollar amount of investment gain for the time period selected.
- Performance: Overall performance return for the time period selected.

All performance information is available quarter-to-date, year-to-date, 3-year, or since inception. On the next page, you'll see a sample image of a Tamarac portal dashboard.

REPORTS

Tamarac offers a variety of performance analytics and transaction reports. The most-used reports are available via the tabs below the colored tiles; these include asset allocation, risk statistics, holdings, and capital flows. These options mirror the data that we have historically provided in your quarterly performance report.

Tamarac offers many additional report options beyond those noted above, including account analytics, comparative reviews, interval performance, realized gains/losses, and much more. You can slice and dice your portfolio and account activity in a variety of ways. Talk to your advisor if there is information you'd like to see but aren't sure how to access it.

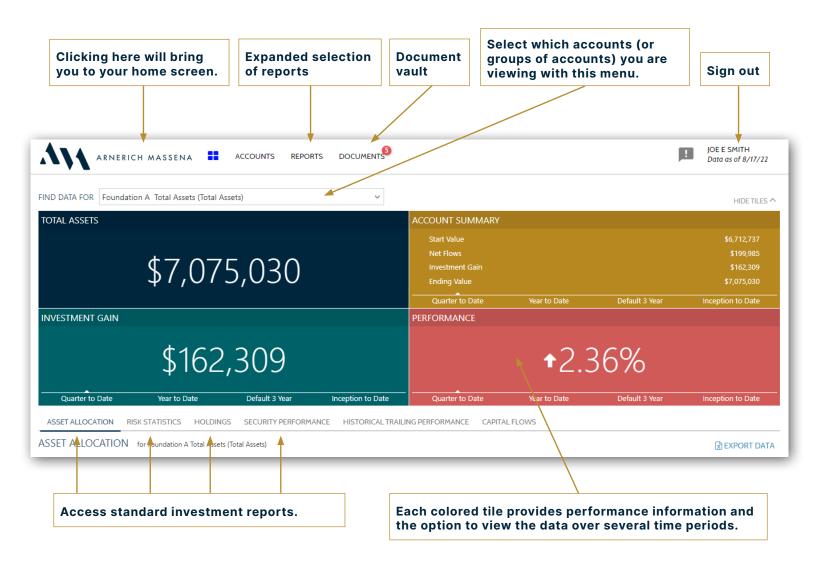
DOCUMENT VAULT

Your Tamarac portal includes a secure document vault, where you can access important documents such as performance reports, K-1s, paperwork for signatures, etc. You will receive notifications when new documents are uploaded to your vault.

See the next page for a sample image of the Tamarac portal home screen.



Sample Tamarac Client Portal Home Screen



Security Note:

When accessing your Tamarac portal or any sensitive data, please take precautions to protect yourself from cybersecurity threats. Use secured connections on public WI-FI when possible (such as a VPN, or "virtual private network") or use cellular networks or mobile hotspots, which are more secure than WI-FI. Additionally, update your software regularly, choose complex passwords or use a password manager, monitor accounts regularly, and enable a password "screen lock" on mobile devices.