



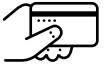


## Introduction to eMoney and Investor 360°®

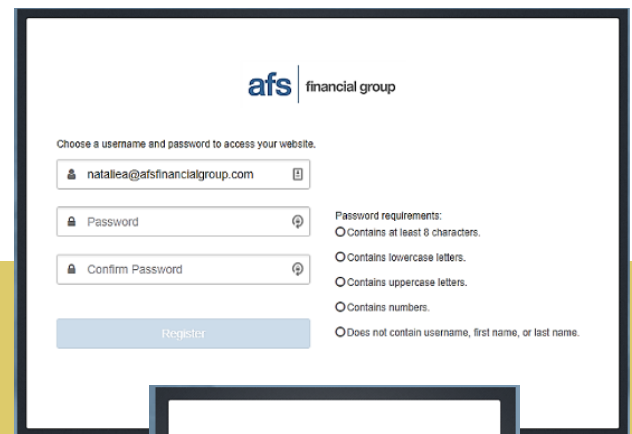
eMoney and Investor 360°® are the two financial planning platforms we use to track and analyze your financial health. These programs are also available for you to utilize to track your own personal financial goals and more.

### eMoney: Your Personal Financial Management Website

➔ eMoney serves as your own personal financial management portal. This software contains secure, comprehensive tools that empower you to take charge of your financial life with our team as your quarterback. You will leverage account aggregation, view your net worth, and track your cash flow, financial goals, and spending, all in one place. This platform has your own financial goal tracking, unlimited document storage, self-designed budgets to track spending, and account aggregation, to provide you with your complete financial picture at your fingertips.

➔ A Window into Your Financial World/Seeing Your Full Financial Picture in One Place:

eMoney Useful Features	
 <b>Organizer</b>	Enter in your essential details and connect to your financial accounts.
 <b>Goals</b>	Add your financial goals, track progress towards funding and achieving those goals, and gauge how these goals impact your long-term financial outlook.
 <b>Spending</b>	Monitor your cash flow transactions and create budgets to help you stay on track.
 <b>Investments</b>	Learn more about your asset allocation, view the value of your current holdings, and take a look at your asset types for a detailed breakdown of each of your investments.
 <b>Vault</b>	This is your secure digital document storage repository. Upload all of your important and legal documents for easy tracking, storage, and access.

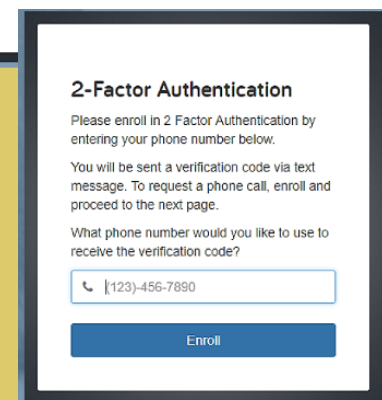


afs financial group

Choose a username and password to access your website.

Register

Password requirements:  
 Contains at least 8 characters.  
 Contains lowercase letters.  
 Contains uppercase letters.  
 Contains numbers.  
 Does not contain username, first name, or last name.



**2-Factor Authentication**

Please enroll in 2 Factor Authentication by entering your phone number below.

You will be sent a verification code via text message. To request a phone call, enroll and proceed to the next page.

What phone number would you like to use to receive the verification code?

Enroll

## Investor 360®: Online Account Access



**24/7  
Account  
Access**

Our advanced client website, Investor360®, illustrates account information, such as account balances, positions, and activity, as well as provides secure access to documents and statements, whenever you want it—24 hours a day, 7 days a week, 365 days a year.



**Access  
Account  
from  
Anywhere**

Because Investor360® is web based, you can access your account information at your office, at home, or anywhere you can connect to the Internet. Investor360® works with today's most popular Internet browsers, including Microsoft Edge, Firefox, Safari (for Macintosh), and Chrome.



**Mobile  
App**

Our mobile app makes it easy for you to view your account information on the go. You can download the app directly from the App Store (for Apple devices) or Google Play (for Android devices). Just search for "Investor360" and follow the prompts to add the app to your smartphone or tablet.

**Investor360®**

Accounts

- Cash: \$25,000
- Credit Cards: -\$3,643
- Investments: \$926,295
- Life Insurance: \$36,600
- Loans: -\$426,385
- Property: \$1,206,000
- Stock Options: 50

**Performance Summary**

Time Weighted Returns

Month	Pacific	MSCI ACWI-USA	Standard & Poor's 500	US Treasury Bills
Jan	1.2%	1.0%	0.8%	0.1%
Feb	0.8%	0.6%	0.4%	0.1%
Mar	1.5%	1.3%	1.1%	0.1%
Apr	1.0%	0.8%	0.6%	0.1%
May	1.8%	1.6%	1.4%	0.1%
Jun	1.4%	1.2%	1.0%	0.1%
Jul	2.1%	1.9%	1.7%	0.1%
Aug	1.6%	1.4%	1.2%	0.1%
Sep	1.9%	1.7%	1.5%	0.1%
Oct	1.3%	1.1%	0.9%	0.1%
Nov	1.7%	1.5%	1.3%	0.1%
Dec	1.1%	0.9%	0.7%	0.1%

Activity Summary

Category	Amount
Beginning Balance (11/15/2020)	\$460,507.00
Contributions	\$0.00
Withdrawals	\$70.00
Realized Gain / Loss	\$0.00
Unrealized Gain / Loss	\$13,249.11
Interest	\$0.00
Dividend / Cap Gains	\$0.00
Ending Balance (11/22/2021)	\$460,687.00
Total Gain / Loss After Fees	\$13,249.11

Performance Summary

Period	Pacific	MSCI ACWI-USA	Standard & Poor's 500	US Treasury Bills
Month to Date	0.8%	0.7%	0.6%	0.0%
Quarter to Date	2.0%	1.8%	1.6%	0.0%
Year to Date	1.0%	0.9%	0.8%	0.0%
1 Year	4.3%	4.0%	3.7%	0.0%
3 Year	4.2%	3.9%	3.6%	0.0%
5 Year	4.1%	3.8%	3.5%	0.0%
10 Year	3.0%	2.8%	2.5%	0.0%
Since 11/15/2020	7.3%	6.8%	6.3%	0.0%

Welcome, Frank and Joanna Miller

Accounts

- Cash: \$25,000
- Credit Cards: -\$3,643
- Investments: \$926,295
- Life Insurance: \$36,600
- Loans: -\$426,385
- Property: \$1,206,000
- Stock Options: 50

**Net Worth**  
\$1,851,767  
as of today

**Investments**  
\$926,377  
as of today

**Goals as of today**

- Retirement 2032 - 2068: Projected Funding 24 of 37 years
- College for Mary Beth 2020 - 2023: Projected Funding \$220,816 of \$220,816
- College for Lucas 2022 - 2025: Projected Funding \$230,835 of \$230,835

**24/7 access to all of your account information**

**AFS Financial Group, LLC**

7700 Old Georgetown Road, Suite 630 | Bethesda, MD 20814

301.961.8407 | [afsfinaancialgroup.com](http://afsfinaancialgroup.com)



## Go Paperless





Investor360° also allows you to elect paperless preferences. Even beyond the lower trading costs, going paperless is safer and even preferable to paper statements. With paperless statements, you don't have to worry about having your account information sitting in your mailbox or having to scan the statements and save them before needing to shred them for security purposes.

- Electing paperless takes just a few steps. Login to your [www.investor360.net](http://www.investor360.net) portal and select "Settings" in the top right corner of your home page. Scroll down to the "Paperless Preferences" section and check the box that says "Check all account and document types for e-delivery to the person listed above."
- All account holders within a household need their own logins and need to go through this election process. Don't have a login yet? Let us know and we will set you up with one!



## Makes Tax Time Easier

Investor360°® makes tax time easier. If you use TurboTax or a similar software, Investor360°® can save you time by accurately transferring the investment account information you will need to complete your federal return.

Investor360° Useful Features	
 <b>Account Overview</b>	Overview displays your accounts and their current values, as well as a summary of activity, asset allocation, and a historical chart of balances.
 <b>Holdings</b>	Holdings shows all your holdings at various levels (e.g., by asset and by asset category), with the option to group them by account or by securities held across all accounts. You can also export data directly to Excel.
 <b>Account Activity</b>	Activity details all your account activity, such as buys and sells, dividends, and adjustments, and allows you to view realized gain/loss information. Smart filters make it easy to drill down into an activity to find what you are looking for.
 <b>Electronic Statements</b>	Statements and confirms are available electronically, and you can save yourself from extra paperwork (and help the environment) by signing up for e delivery of these items.

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