WELCOME TO YOUR PERSONAL FINANCIAL PORTAL

Goodman Financial

MONEY MANAGER • FINANCIAL ADVISOR • PHILANTHROPY

SERVING CLIENTS FOR OVER 30 YEARS

Stay Connected to Your Financial Picture

Home Page	At-a-glance view of pertinent account information
Portfolio	Dynamic view of your entire portfolio
Timeline	Centralized communication between you and your advisor
Vault	Easily keep track of and share your important financial and legal documents

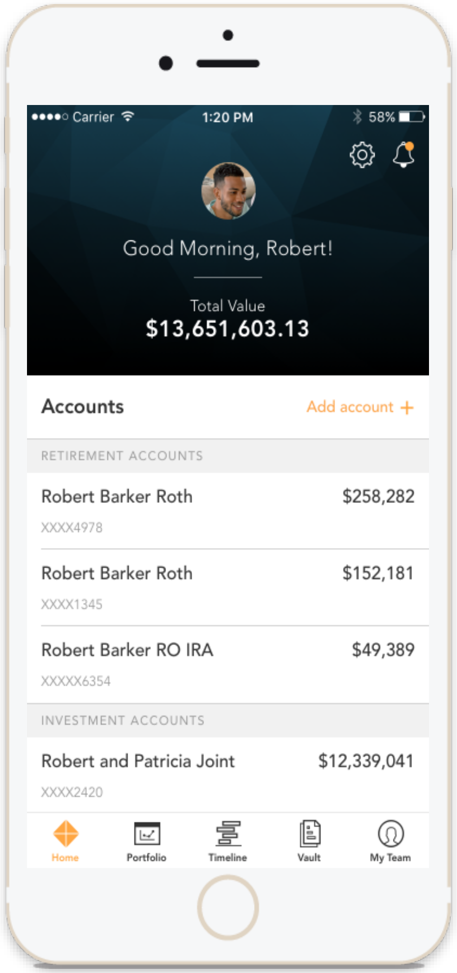
Home Page

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.

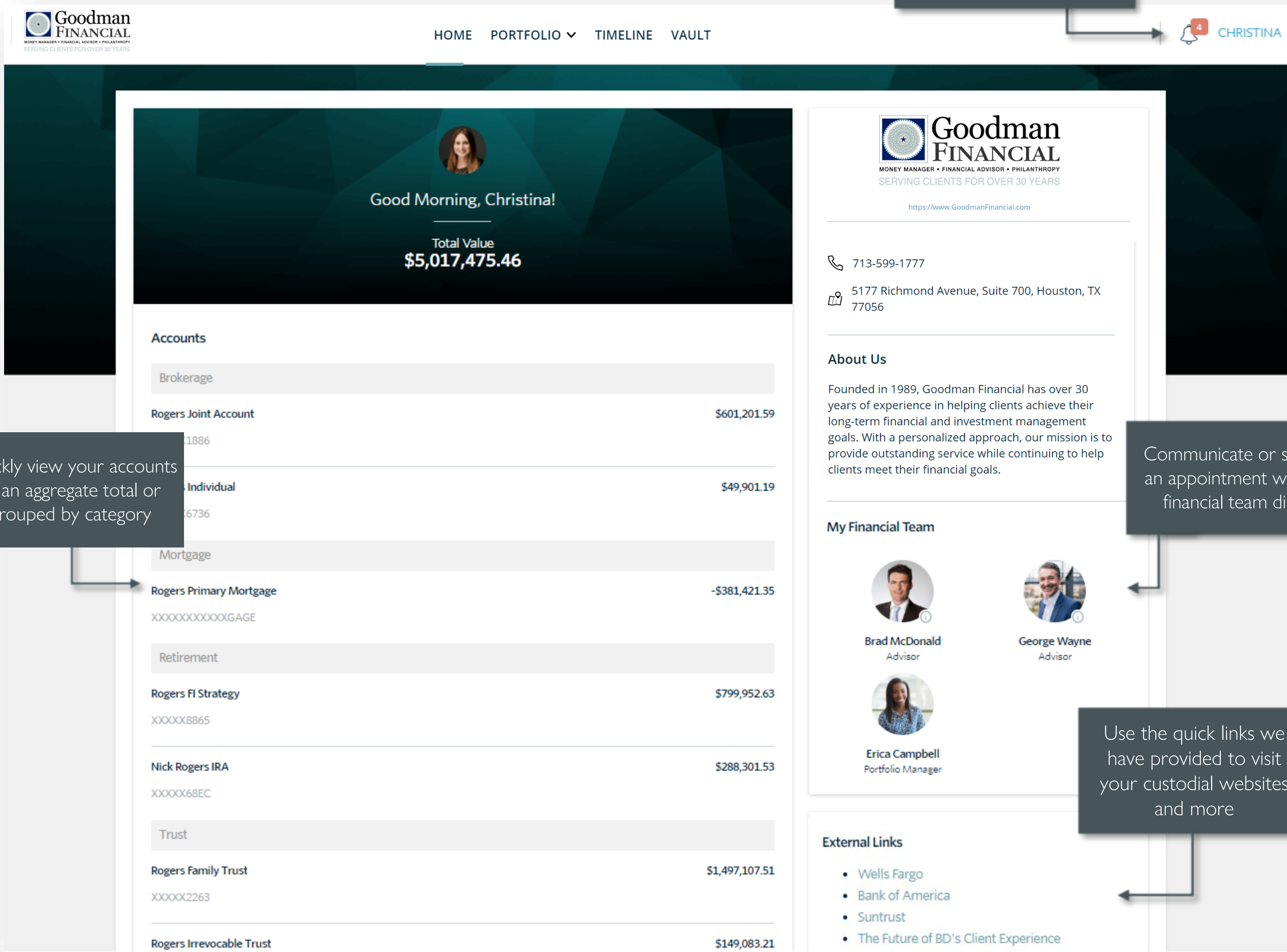
You can stay connected to your financial team with clickable links to phone numbers, emails, and office locations.

You can also quickly contact your advisor while on the go. In addition to contacting us, we will send you communications and updates from your team—all directly within the portal.



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

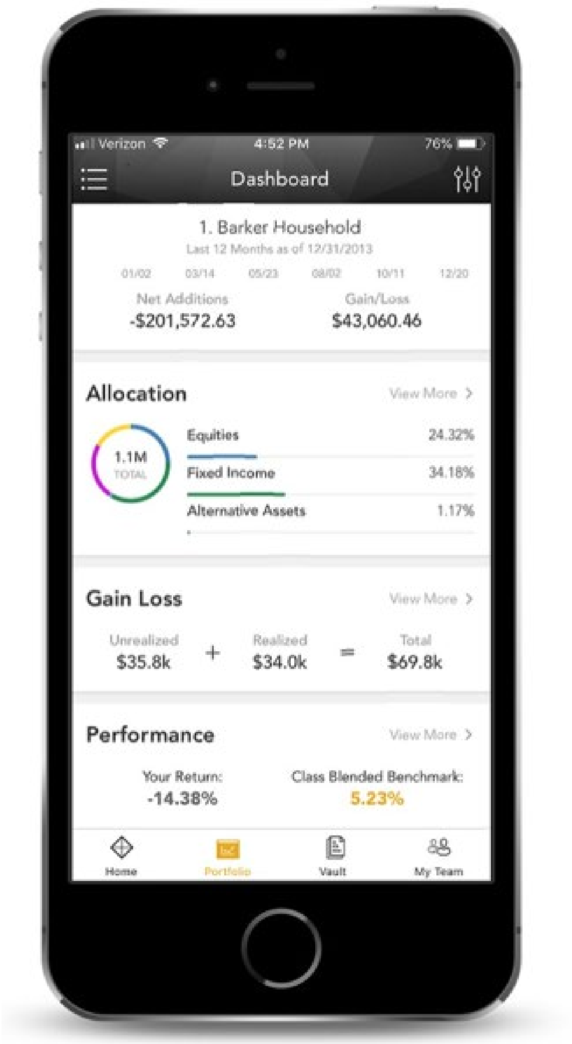
Use the quick links we have provided to visit your custodial websites and more

Portfolio

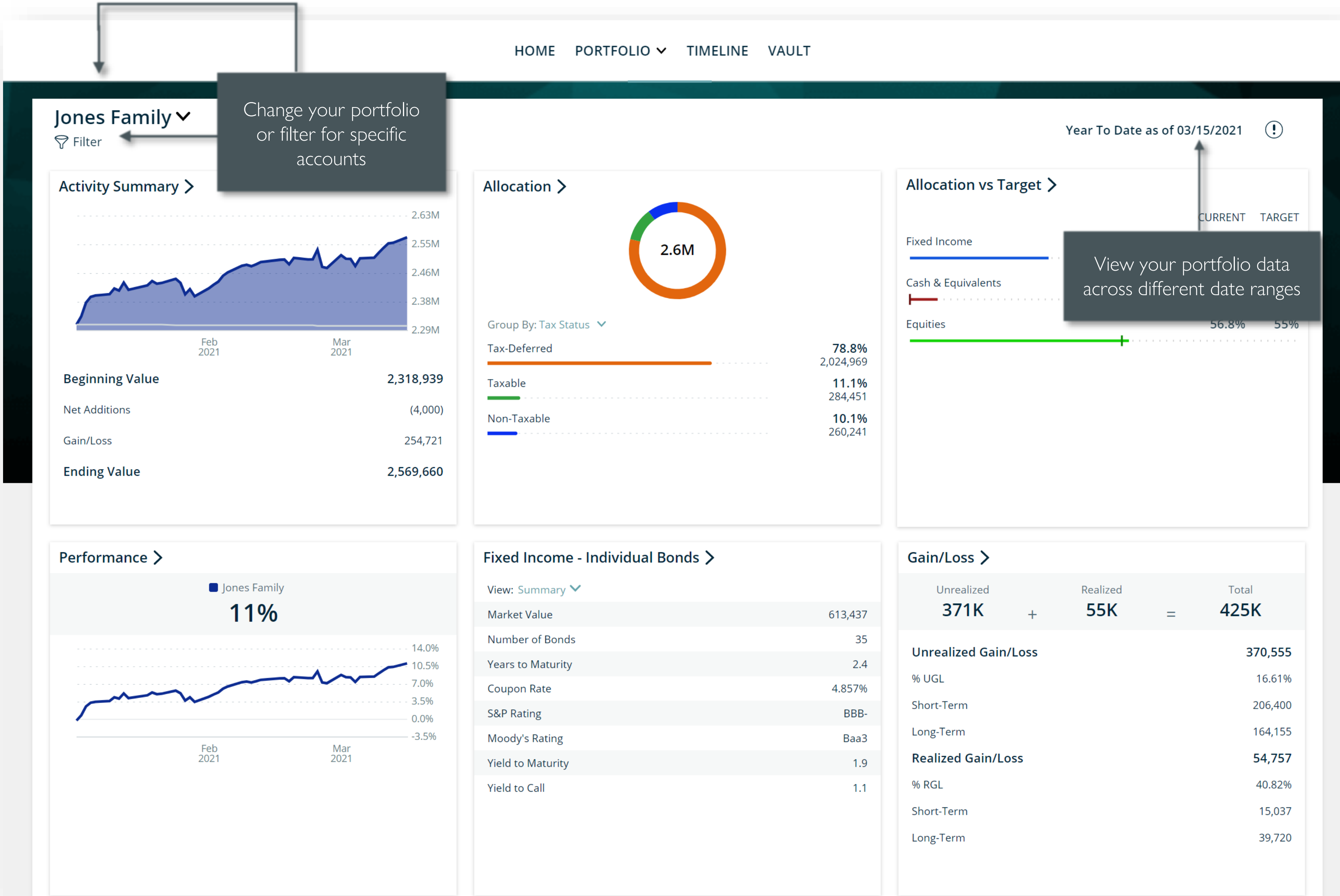
The Portfolio dashboard is where you can view additional details about your portfolio. The dashboard gives you a dynamic overview of your portfolio with performance cards highlighting key information of your portfolio.

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

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



Portfolio


HOME
PORTFOLIO
TIMELINE
VAULT
Jones Family
Filter
Change your portfolio or filter for specific accounts
Year To Date as of 03/15/2021
Activity Summary
2.63M
2.55M
2.46M
2.38M
2.29M
Feb 2021
Mar 2021
Beginning Value 2,318,939
Net Additions (4,000)
Gain/Loss 254,721
Ending Value 2,569,660
Allocation
2.6M
Group By: Tax Status
Tax-Deferred 78.8% 2,024,969
Taxable 11.1% 284,451
Non-Taxable 10.1% 260,241
Allocation vs Target
CURRENT
TARGET
Fixed Income
Cash & Equivalents
Equities 56.8% 55%
View your portfolio data across different date ranges
Performance
Jones Family
11%
14.0%
10.5%
7.0%
3.5%
0.0%
-3.5%
Feb 2021
Mar 2021
Fixed Income - Individual Bonds
View: Summary
Market Value 613,437
Number of Bonds 35
Years to Maturity 2.4
Coupon Rate 4.857%
S&P Rating BBB-
Moody's Rating Baa3
Yield to Maturity 1.9
Yield to Call 1.1
Gain/Loss
Unrealized 371K + Realized 55K = Total 425K
Unrealized Gain/Loss 370,555
% UGL 16.61%
Short-Term 206,400
Long-Term 164,155
Realized Gain/Loss 54,757
% RGL 40.82%
Short-Term 15,037
Long-Term 39,720

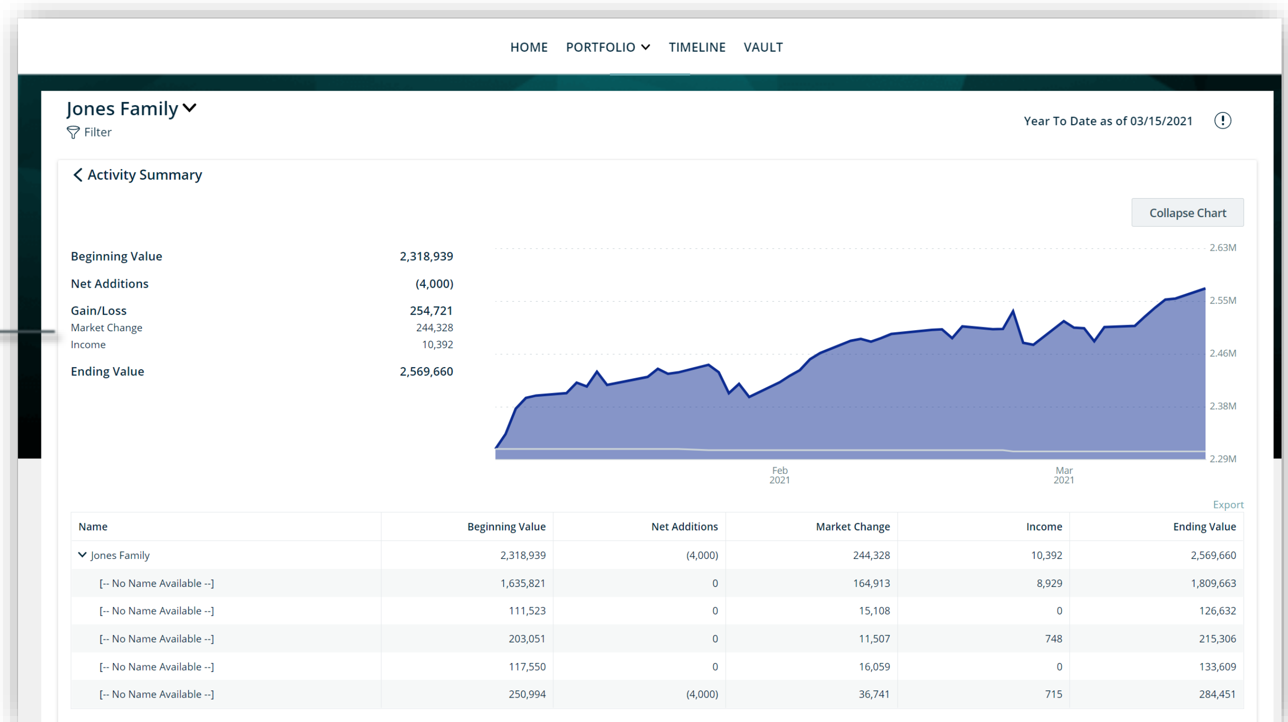
Activity Summary

View activity and changes in your portfolio or account balance

(Consolidated View)

Hover over graph to view net addition and market value information for a specific date

See income and performance breakouts

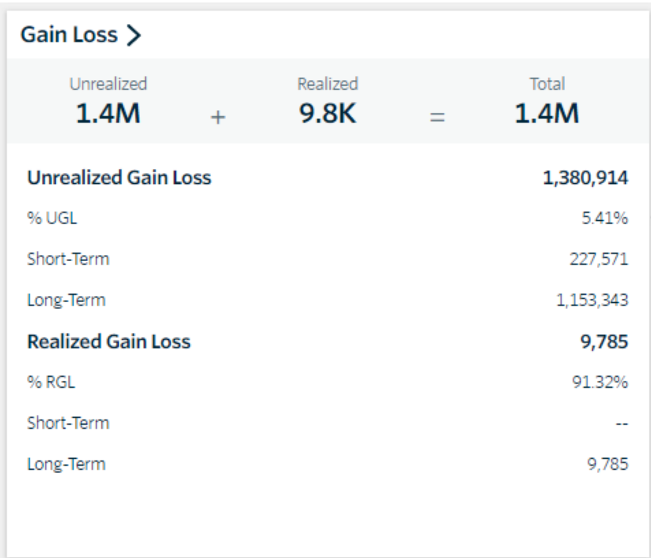


Name	Beginning Value	Net Additions	Market Change	Income	Ending Value
Jones Family	2,318,939	(4,000)	244,328	10,392	2,569,660
[-- No Name Available --]	1,635,821	0	164,913	8,929	1,809,663
[-- No Name Available --]	111,523	0	15,108	0	126,632
[-- No Name Available --]	203,051	0	11,507	748	215,306
[-- No Name Available --]	117,550	0	16,059	0	133,609
[-- No Name Available --]	250,994	(4,000)	36,741	715	284,451

(Expanded View)

Gain Loss

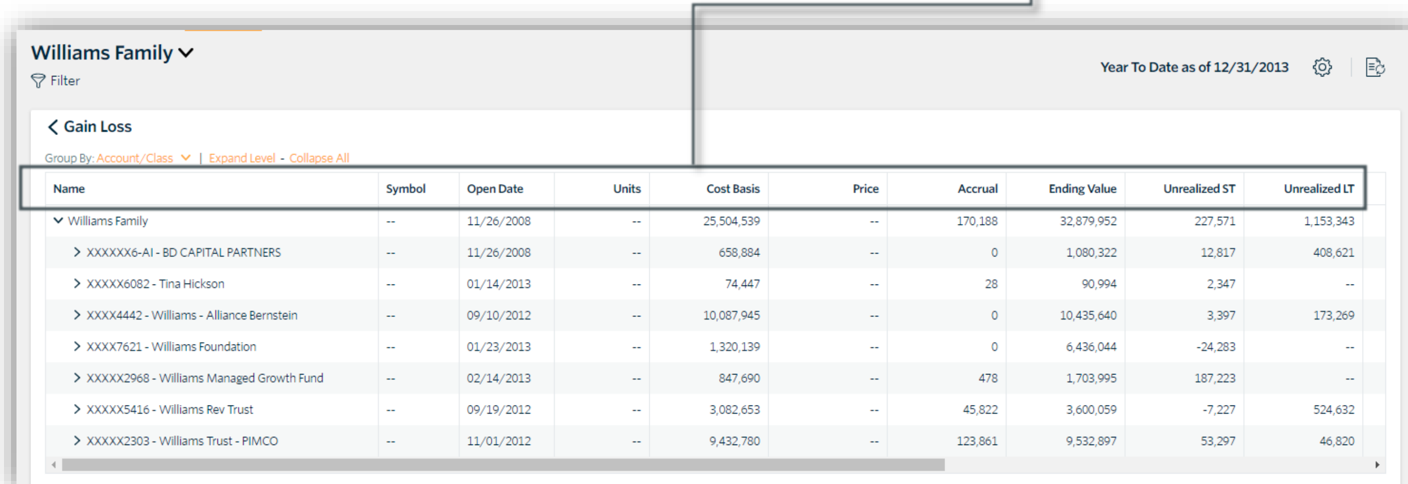
View realized and unrealized gain/loss information for your investments



(Consolidated View)

View your high level gain/loss breakdown from the dashboard

Sort column headers to quickly organize your cost basis information


Williams Family

Filter

Year To Date as of 12/31/2013

< Gain Loss

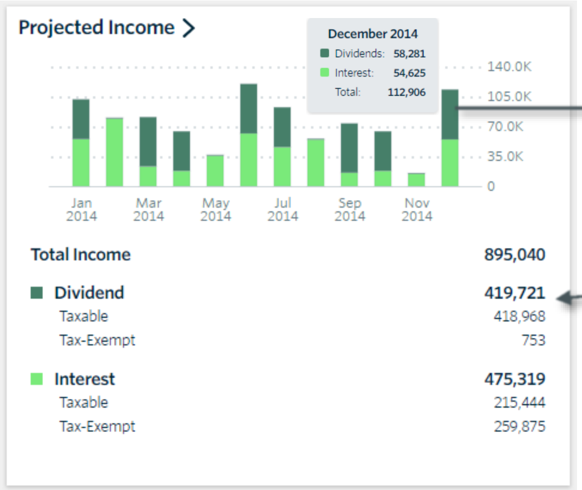
Group By: Account/Class | Expand Level - Collapse All

Name	Symbol	Open Date	Units	Cost Basis	Price	Accrual	Ending Value	Unrealized ST	Unrealized LT
Williams Family	--	11/26/2008	--	25,504,539	--	170,188	32,879,952	227,571	1,153,343
> XXXXXX6-AI - BD CAPITAL PARTNERS	--	11/26/2008	--	658,884	--	0	1,080,322	12,817	408,621
> XXXXX6082 - Tina Hickson	--	01/14/2013	--	74,447	--	28	90,994	2,347	--
> XXXX4442 - Williams - Alliance Bernstein	--	09/10/2012	--	10,087,945	--	0	10,435,640	3,397	173,269
> XXXX7621 - Williams Foundation	--	01/23/2013	--	1,320,139	--	0	6,436,044	-24,283	--
> XXXXX2968 - Williams Managed Growth Fund	--	02/14/2013	--	847,690	--	478	1,703,995	187,223	--
> XXXXX5416 - Williams Rev Trust	--	09/19/2012	--	3,082,653	--	45,822	3,600,059	-7,227	524,632
> XXXXX2303 - Williams Trust - PIMCO	--	11/01/2012	--	9,432,780	--	123,861	9,532,897	53,297	46,820

(Expanded View)

Projected Income

Review a snapshot of expected dividend and interest payments



(Consolidated View)

Hover to view monthly dividend and interest detail

The card displays total projected income for the selected time period, a breakout of projected dividends and interest, plus a month-by-month bar chart

Choose between viewing projected income for 'Next 12 Months' or 'Remainder of Year'

View projected income at your grouped level

(Expanded View)

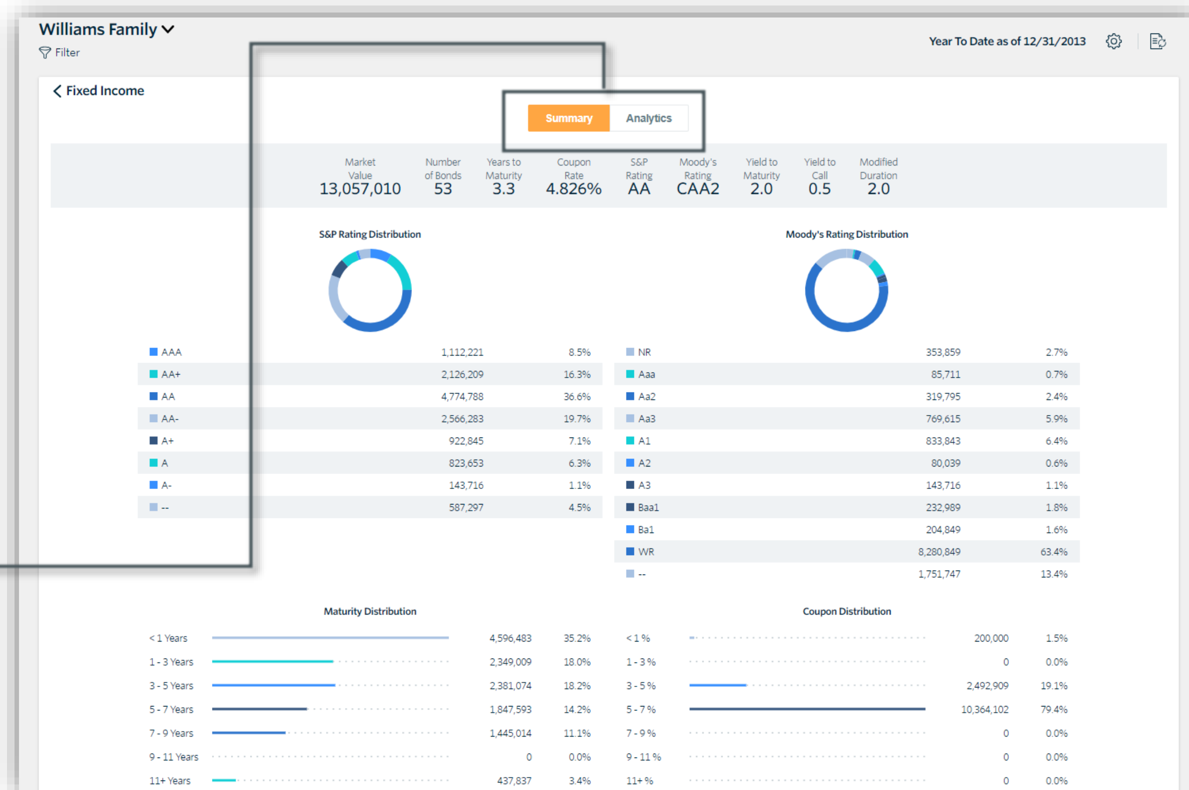
Fixed Income – Individual Bonds

Review a snapshot of fixed income holdings in your portfolio

(Consolidated View)

The card displays important statistics about the individual bond positions of your portfolio.

Toggle between a summary page and analytical data associated with your fixed income holdings

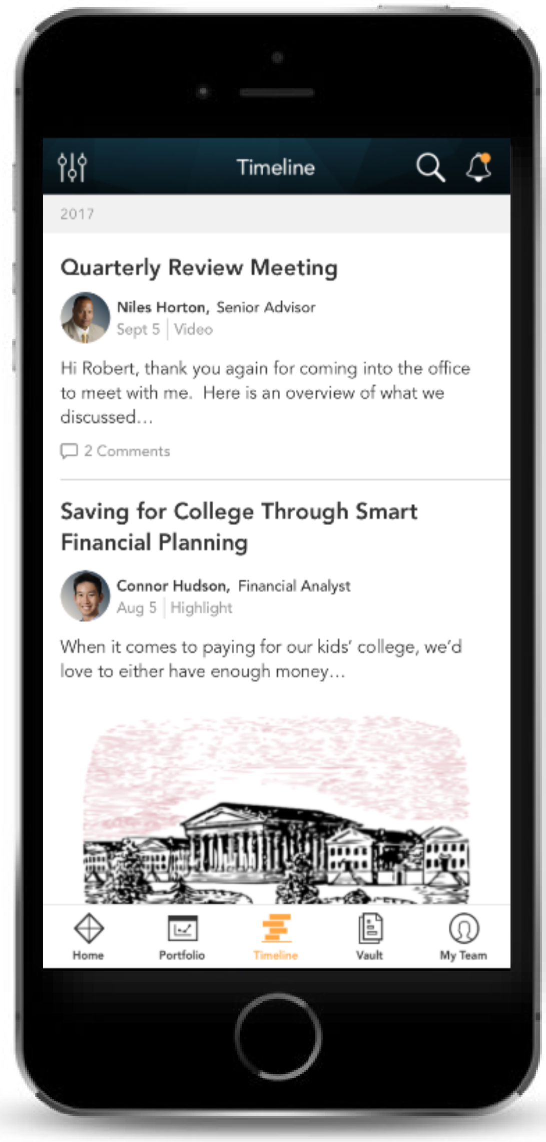


(Expanded View)

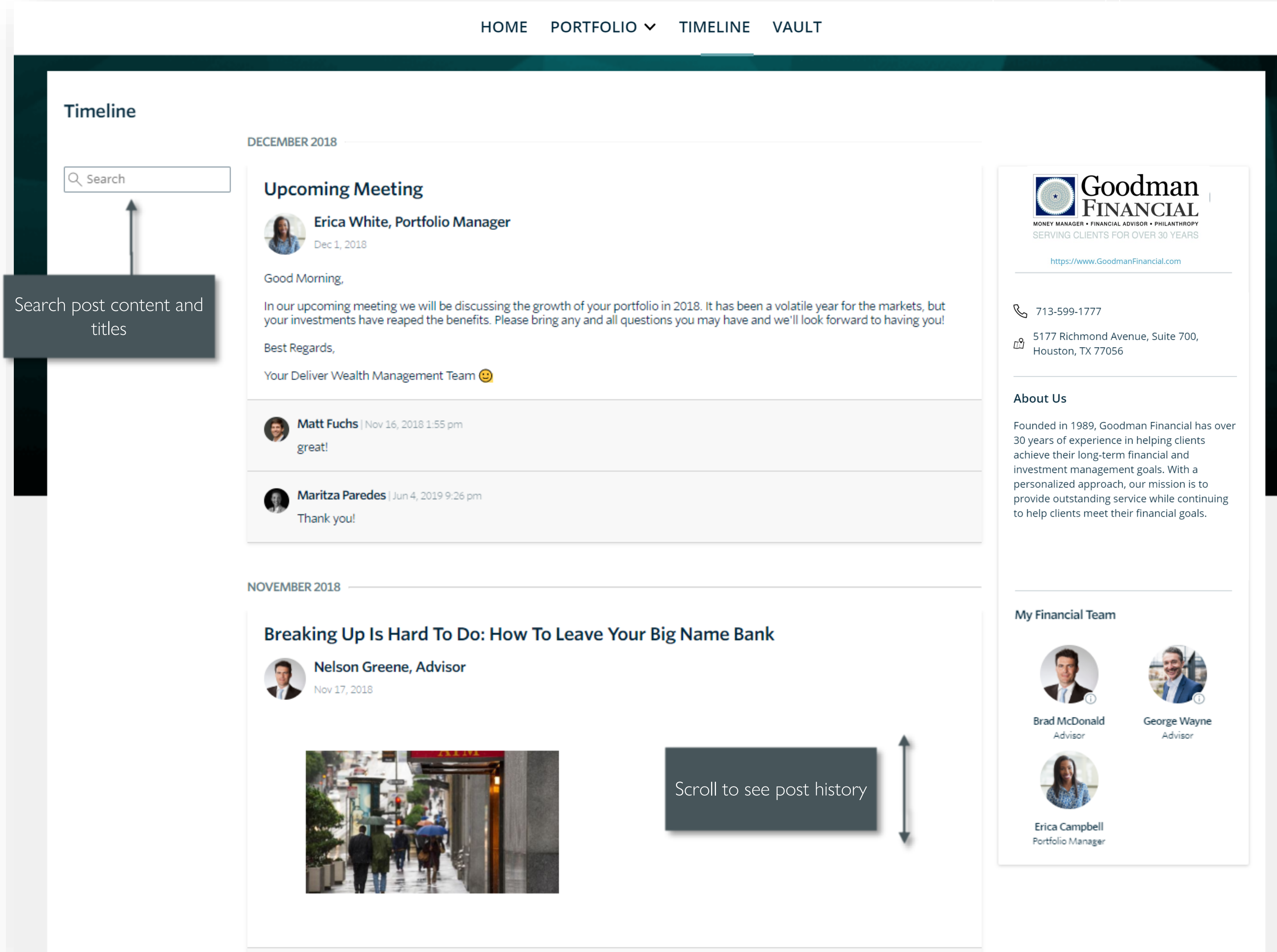
Relationship Timeline

The Relationship Timeline is a consolidated, curated feed of posts designed to memorialize interactions that occur between you and your team! There are countless events and activities representing your financial life journey and Timeline is a consolidated experience designed to capture this activity over time.

We view this as a great communication tool between you and us!



Relationship Timeline



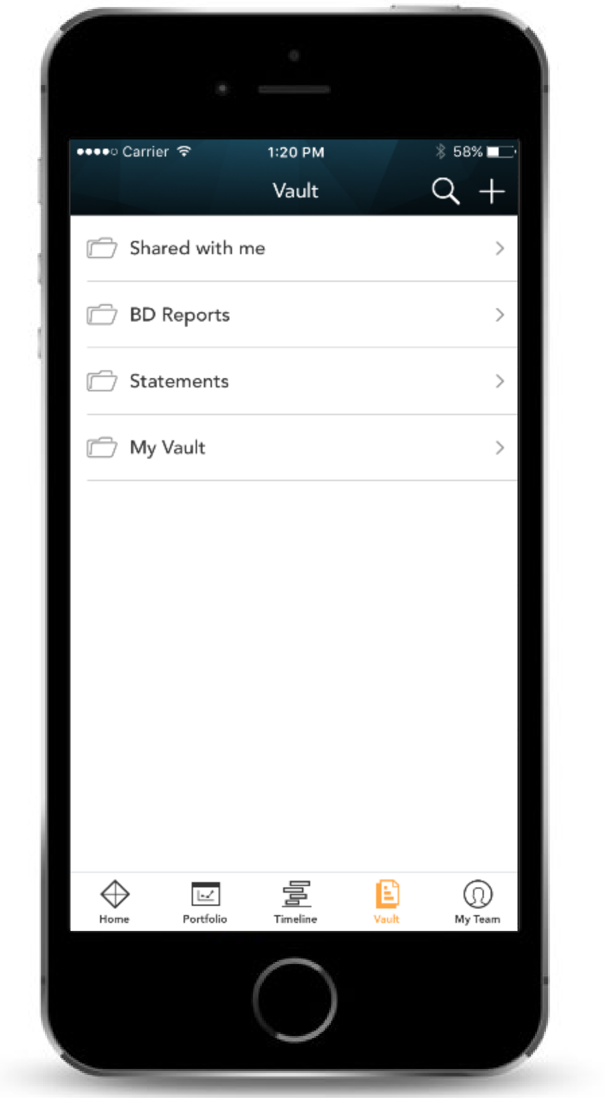
Vault

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.

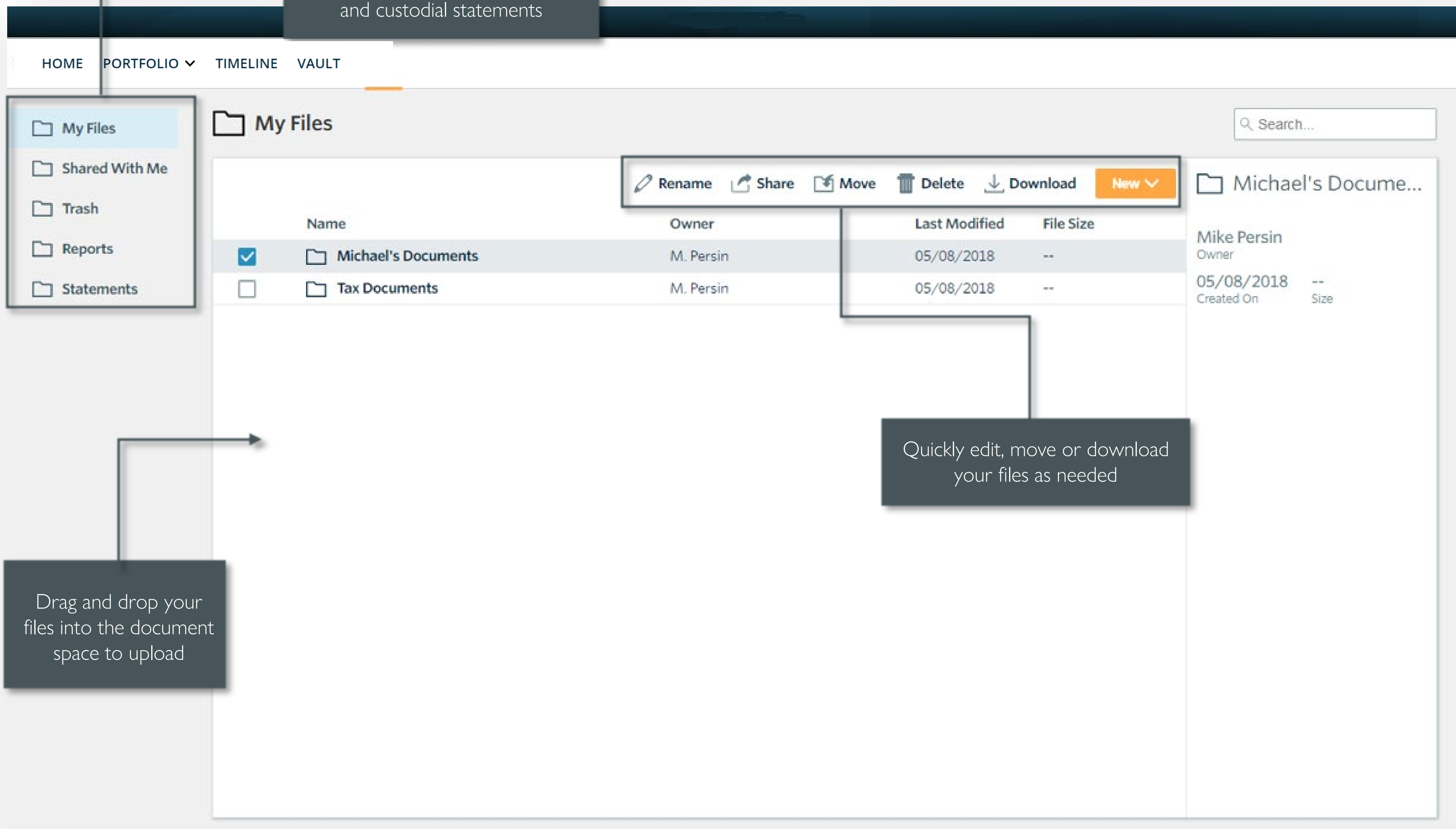
The Vault is also an area where we can share documents with each other through the Shared Folders option.

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



Vault

Securely store documents/files, share items with your financial team, 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 in to the site

Username

Password

Sign In

Trouble Logging In?

Error! Invalid username and password combination.

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

Trouble logging in?

What's the problem?

I forgot my password.

I forgot my username.

I need to unlock my account.

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

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. ---

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

Follow the steps provided to resolve login issues

Your personalized portal keeps you connected to your financial life, your advisory team, and everything else you need for managing your wealth.

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If you have any questions, please contact us.
We are always here for you.

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