

## Introducing DashGuide, Our New Mobile App

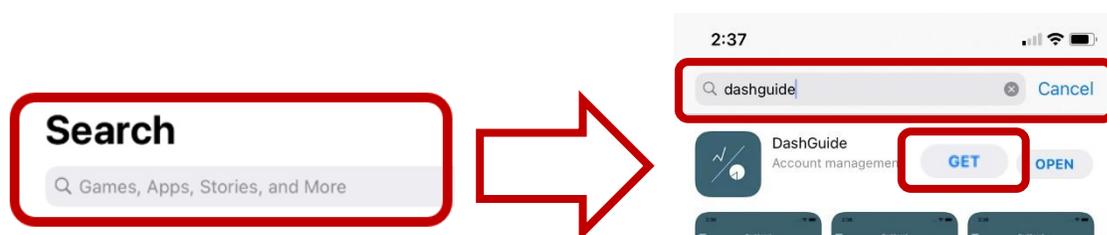
We are excited to launch our mobile application, DashGuide, our client Wealth Portal now available on mobile and tablet devices. The app includes many of the same features and functions as the online portal with the ability to view your managed portfolio value, portfolio allocation, personal net worth and projected sustainable spending in retirement. You also have the ability to contact or schedule a meeting with your advisor securely through the app.

### DashGuide Features

As a client, you can expect:

- Biometric login and two-factor authentication for your security
- Your advisor's contact information with secure messaging and a meeting scheduler
- Views of your portfolio balance and investments
- A holistic view of your personal net worth including any linked external accounts

DashGuide is available for download in the [Apple App Store](#) and [Google Play Store](#). The following sections review key functions along with screenshots to help you navigate the app.



### How to Log In

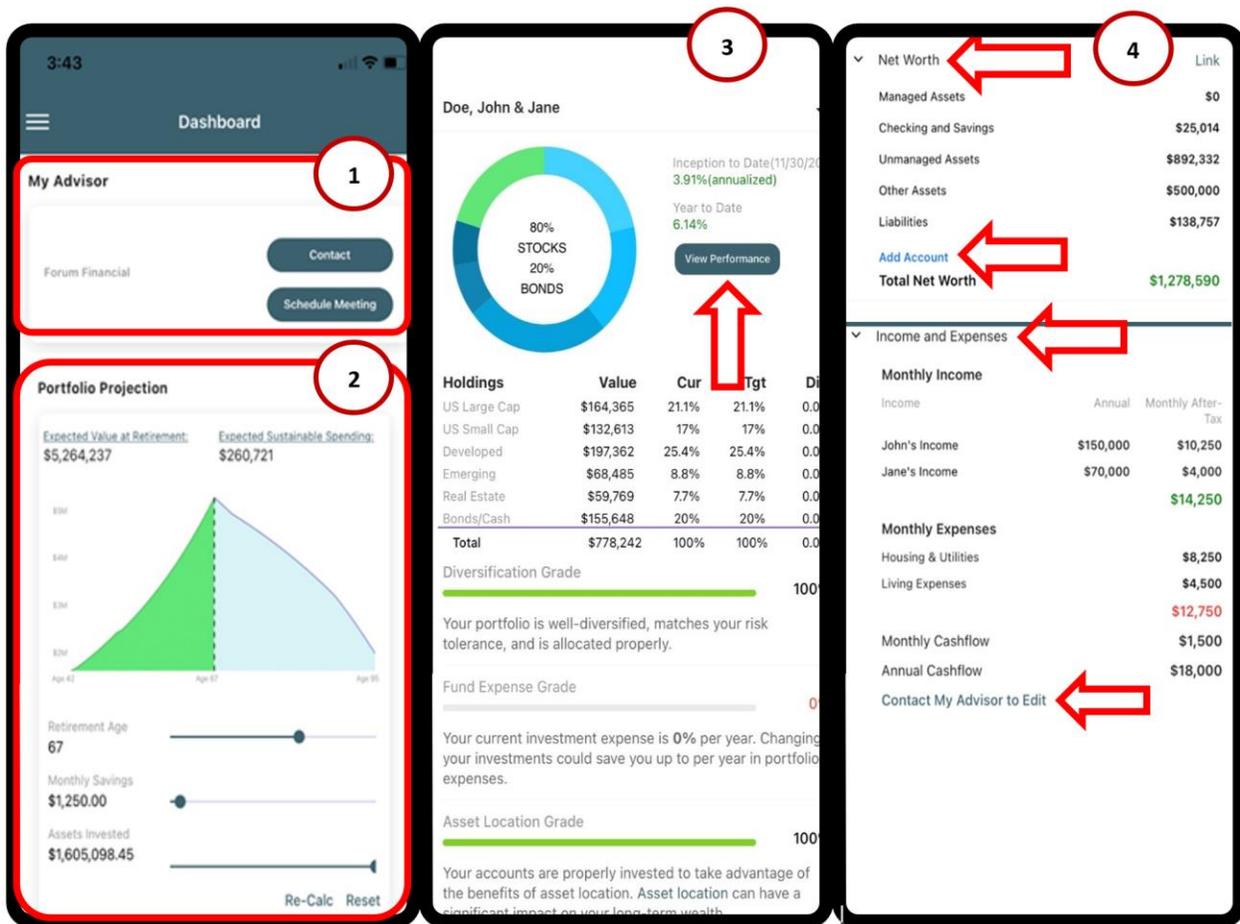
- You will use the same email and password credentials that you use to access your Wealth Portal on our website. Note that this will be different than your custodian login for Schwab, TD or Fidelity portals.
- If you have not already enabled and set up two-factor authentication online, you will be asked to set up two-factor authentication when logging into the mobile app for the first time.
- If you have forgotten your password, tap on Forgot Password and enter the email address that we have on file. Instructions on how to reset your password will be emailed to you.

### Dashboard Details

Upon logging into the app, you will land on the Dashboard.

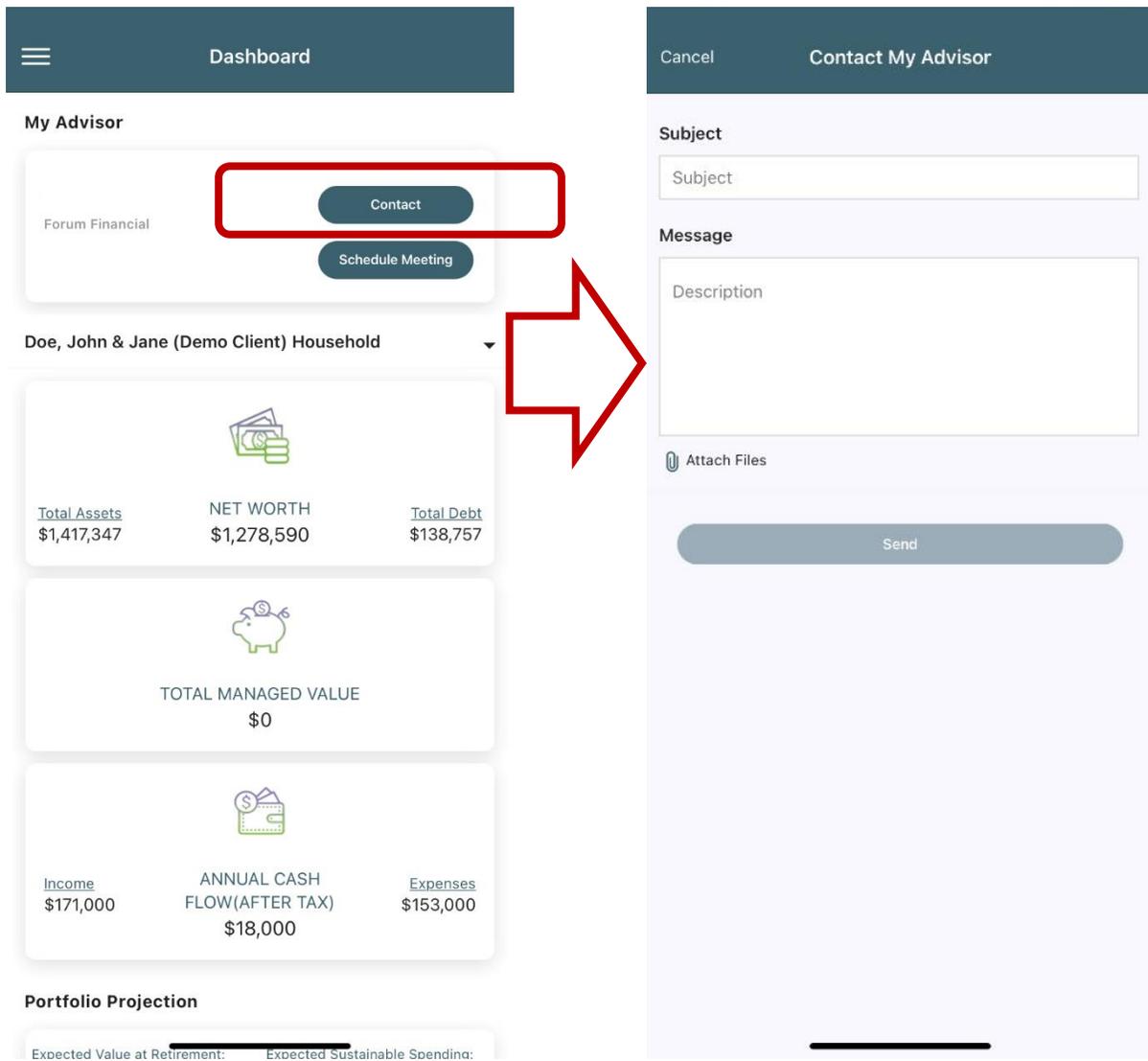
The Dashboard houses the following details and data. See the four sections below:

1. Your advisor's information and ways to get in touch or schedule a meeting appears at the top.
2. With the Wealth Portal Projection tool section, you can adjust the assumptions for retirement age, monthly savings and assets invested (tapping on the figures themselves or using the slide bar) using Re-Calc to adjust the portfolio projection to estimate the projected portfolio value and projected annual retirement spending.
3. The View Performance button will take you to your client reporting portal in your mobile internet browser.
4. You can expand each section for net worth and income and expenses by tapping the title of the section to make them visible. You can also link an outside account from here. If you would like to contact your advisor about updating any other information on the page, you can tap the option to Contact my Advisor to Edit to securely send a message to your advisor.



### Contact Your Advisor

- Tap on Contact on the Dashboard to send a secure message to your advisor. Along with your message, you can include a subject and attach any files you would like to include, when applicable.



### Schedule a Meeting

- Tap on Schedule Meeting on the Dashboard to schedule an appointment with your advisor or send a secure request to your advisor to schedule an appointment for the day and time you prefer.

Your advisor's calendar may be updated to show available times for you to select from (if they are using one of our third-party partners such as Calendly or ScheduleOnce). If you are not selecting one of the times already available, you will have the option to send to your advisor a message and subject along with the meeting date and time you are requesting.

**Dashboard**

**My Advisor**

Forum Financial Contact Schedule Meeting

**Doe, John & Jane (Demo Client) Household**

**NET WORTH**  
Total Assets: \$1,417,347 | Total Debt: \$138,757

**TOTAL MANAGED VALUE**  
\$0

**ANNUAL CASH FLOW(AFTER TAX)**  
Income: \$171,000 | Expenses: \$153,000 | ANNUAL CASH FLOW(AFTER TAX): \$18,000

**Portfolio Projection**

Expected Value at Retirement: \_\_\_\_\_ Expected Sustainable Spending: \_\_\_\_\_

**Schedule A Meeting**

Cancel

**Subject**

**Message**

**Suggested Meeting Time**

07/01/2021

Select Timezone

1 : 0 AM

**Submit**

**Need Help Using DashGuide?**

Please reach out to your advisor if you are having any issues accessing the app. In addition, please let us know if any functionality may not be appropriately working for you, so that we can share that feedback with our technology team.