PRECISION
Financial Services, Inc.
*Designed to Fit Your Needs*

We are pleased to announce major enhancements have been implemented within our Tamarac Client Portal to provide a more robust user experience for all of our valued clients. The complete overhaul of our Tamarac Client Portal was designed to be efficient yet simplistic, prioritizing the relevant information a client seeks to view when accessing their portfolios.

## Dashboard:

- The improved Tamarac Client Portal dashboard provides an overview of your portfolio at a glance, reporting Account Balances, Holdings, Transactions, Asset Allocation, Performance, Capital Flows, and an Income Summary.
- Each widget has direct links to view each report in further detail
- Dashboards can be duplicated and customized to specific user preference

## Available Reports:

- **Summary** – *For overall portfolio or account performance across multiple time intervals*
- **Comparative Review** – *For individual account and reporting group balances*
- **Account Performance** – *For tracking individual account performance across multiple time intervals*
- **Position Performance** – *For tracking performance of each individual security held within investment account(s)*
- **Holdings** – *For viewing current security balances and cost basis held within investment account(s)*
- **Asset Allocation** – *For viewing asset class allocation for all securities held within investment account(s)*
- **Capital Flows** – *For viewing and comparing account value(s) vs. net investment*
- **Transactions** – *For viewing all transactions within investment account(s)*

- **Contributions & Withdrawals** – *For viewing only contributions and withdrawals within investment account(s)*
- **Trades** – *For viewing only buys and sells within investment account(s)*
- **Realized Gains/Losses** – *For viewing capital gains or losses realized within investment account(s)*
- **Projected Income** – *For viewing an estimate of expected dividend and interest income to be generated within investment account(s)*
- **Benchmark Comparison** – *For comparing account performance across multiple market benchmarks*
- **Billing History** – *For viewing management fees incurred across multiple time intervals*

## Additional Features:

- **Security** – *Multi-Factor Authentication (MFA) is available within the new Tamarac Client Portal for either email or SMS Text-Message verification codes*
- **Customization** – *Users can customize their Tamarac Client Portals, including creating multiple dashboards, light mode appearance vs. dark mode appearance, and filtering data to view All Accounts, specific Reporting Groups, or by one specific account.*
- **Documents** – *The Tamarac Document Portal offers clients a secure method of uploading confidential information directly to the PFS Team. Periodic Review reports and Quarterly Performance Reports are posted directly into this portal*
- **Service Team** – *For quick access directly to your PFS Service Team, includes each member's direct contact information and a brief description of their respective roles.*
- **PFS Website** – *A direct link to our website is embedded within the Tamarac Client Portal to view additional PFS services, resources, information and news.*

## Mobile App Capabilities

Clients can access their Tamarac Client Portals using the **"Envestnet Client View"** app. Once the app is downloaded on your device, enter your username (email) and password. Enter **"PFSPartners"** as your portal code and click "Sign In". Link to Envestnet Client View App

**Envestnet Client View**

Finance

Open

ENVESTNET

**Email address** (required)

**Password** (required)

**Portal code**

PFSPartners

Remember me

Enable Face ID

**Sign in**

Forgot your password?

**Not Enrolled?** – If you have never established your online access but would like to, please contact us at anytime for assistance. Our service team can walk you through step-by-step instructions for establishing and accessing your Tamarac Client Portal.

**eDelivery Preference?** – If you are interested in receiving statements, confirmations, tax documents and other custodian correspondence electronically, please contact Matthew LaFevre or Miguel Dajer for Wealthscape Investor enrollment assistance.

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