



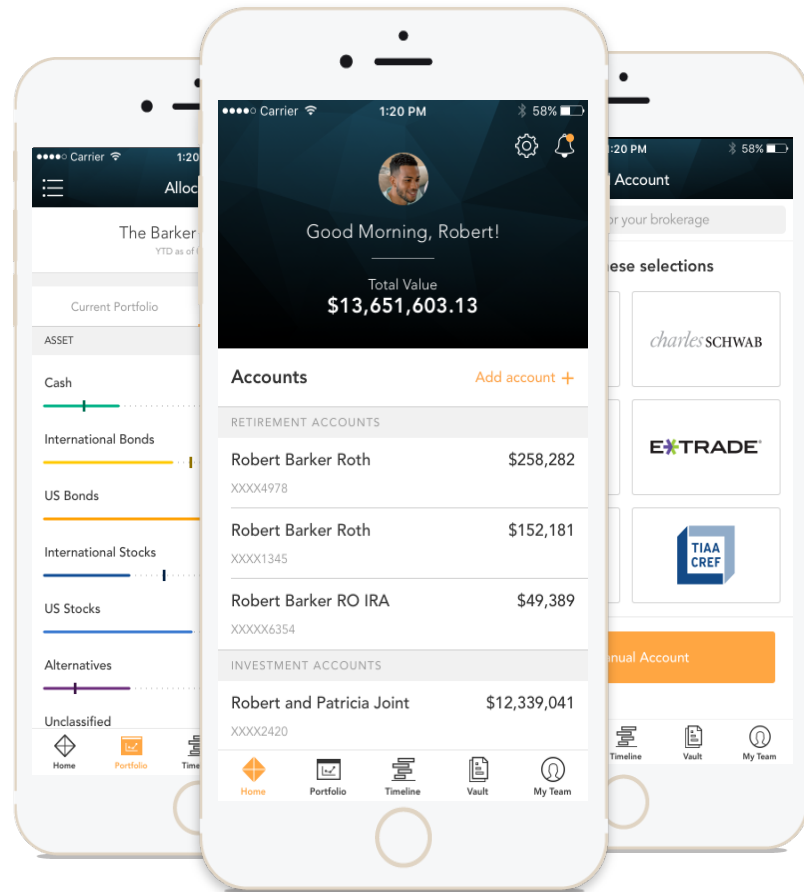
WELCOME TO YOUR MIDLAND

FINANCIAL PORTAL



PERSONALIZED FOR YOU

From your portal, you have access to unique information and insights, account details, your investment dashboard, a document vault, instant access from any of your devices, and more.



STAY CONNECTED TO YOUR **FINANCIAL PICTURE**

Homepage

At-a-glance view of pertinent account information

Portfolio

Dynamic view of your entire portfolio

Vault

Easily keep track of and share your important financial and legal documents

Net Worth

A detailed list of your accounts

Login Questions

Helpful hints

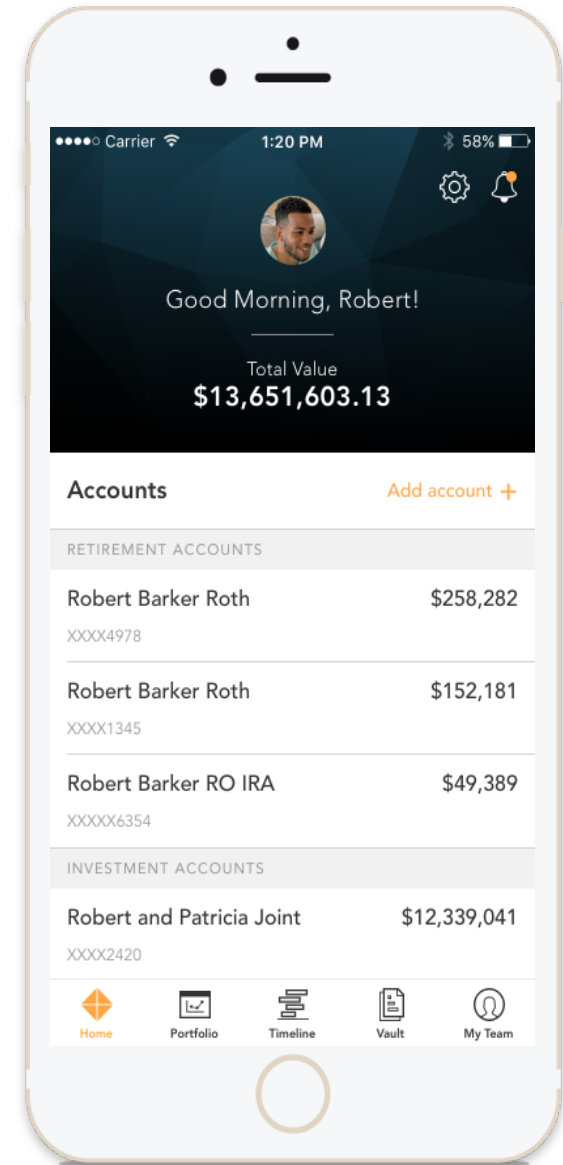
HOMEPAGE

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. Next to your accounts, you'll also find your top holdings for quick reference.

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.



HOMEPAGE

View notifications from your advisor

The screenshot shows the Midland Wealth Management homepage. At the top left is the Midland logo. The navigation bar includes 'HOME' (highlighted), 'NET WORTH', 'PORTFOLIO', 'TIMELINE', 'VAULT', and 'PLANNING'. On the right of the navigation bar are icons for a checkmark and a bell. The main content area is divided into several sections:

- Header:** A dark grey banner with a profile icon, the text 'Good Morning', and 'Total Value \$1,066,310.01'.
- Accounts:** A table listing five sample accounts with their values and dates.
- Midland Card:** A white card with the Midland logo, website URL, phone number, and an 'About Us' section.
- Watch List:** A section titled 'Watch List' with a 'Manage Watch List >' link and a message stating 'You are not following anything' with an 'Add Symbol' button.
- External Links:** A list of links including 'Market Insights', 'Wealth Blog', 'Our Wealth Management Group', 'Meet Midland Wealth Management', and 'Why Midland Wealth Management'.

Four blue callout boxes provide additional information:

- Top right: 'View notifications from your advisor' with an arrow pointing to the bell icon.
- Bottom left: 'Quickly view your accounts as an aggregate total or grouped by category' with an arrow pointing to the Accounts table.
- Right side (top): 'Communicate or schedule an appointment with your financial team directly' with an arrow pointing to the phone number.
- Right side (middle): 'Pick and choose stocks, ETF and mutual funds that matter to you to track daily' with an arrow pointing to the Watch List section.
- Right side (bottom): 'Use quick links we have provided to view our latest insights and more' with an arrow pointing to the External Links section.

Quickly view your accounts as an aggregate total or grouped by category

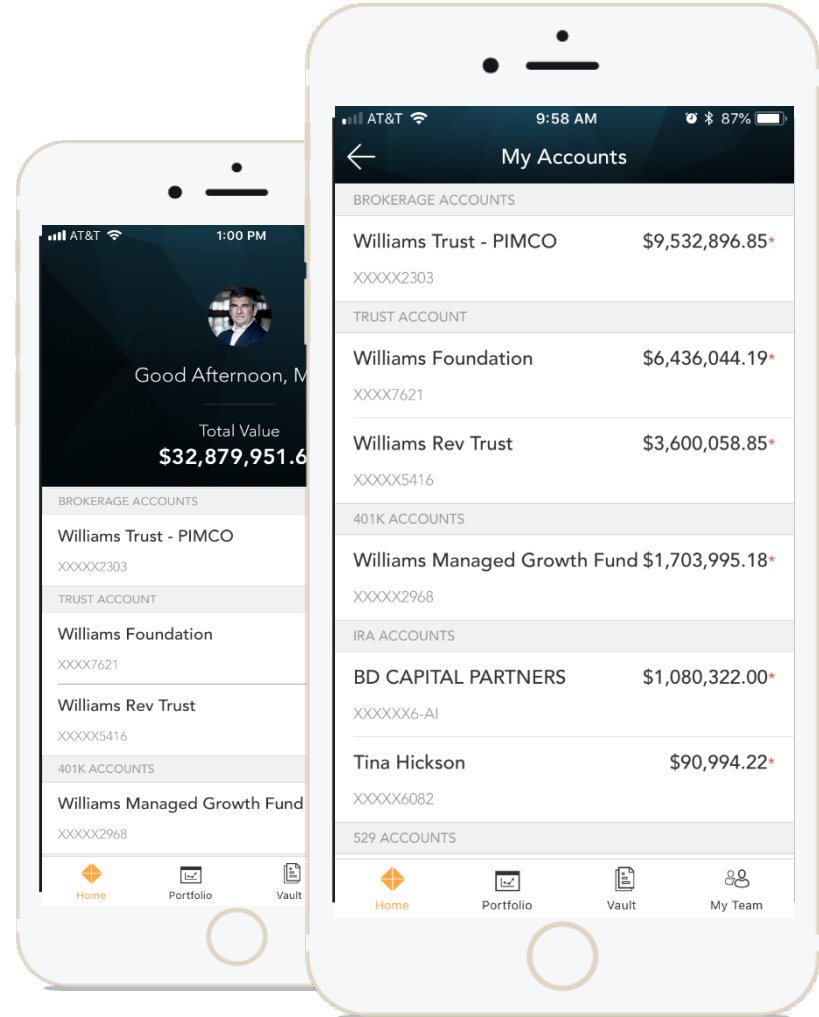
Communicate or schedule an appointment with your financial team directly

Pick and choose stocks, ETF and mutual funds that matter to you to track daily

Use quick links we have provided to view our latest insights and more

NET WORTH

Within the Net Worth space, the My Accounts page provides a detailed list of your accounts. Balances and statuses are visible at a glance. You can expand each account to see your holdings and their individual values.



NET WORTH

The screenshot shows a financial dashboard with the Midland logo in the top left. The navigation bar includes 'HOME', 'NET WORTH' (highlighted with a blue box), 'PORTFOLIO', 'TIMELINE', 'VAULT', and 'PLANNING'. On the right side of the navigation bar are icons for a document and a bell. Below the navigation bar is a sub-header 'Accounts'. On the left side, there is a summary section titled 'Accounts' showing a total value of '\$1,066,310.01' and a button labeled '5 Accounts'. A blue callout box with an arrow points to the '5 Accounts' button, containing the text 'Click on accounts to view holding level detail'. The main content area displays a table of accounts with columns for 'Account Name', 'Custodian', 'Value', and 'As of Date'. The table lists five sample accounts, all with 'Fidelity IWS' as the custodian and '03/18/20' as the date. A 'Collapse All' link is located in the top right of the table area.

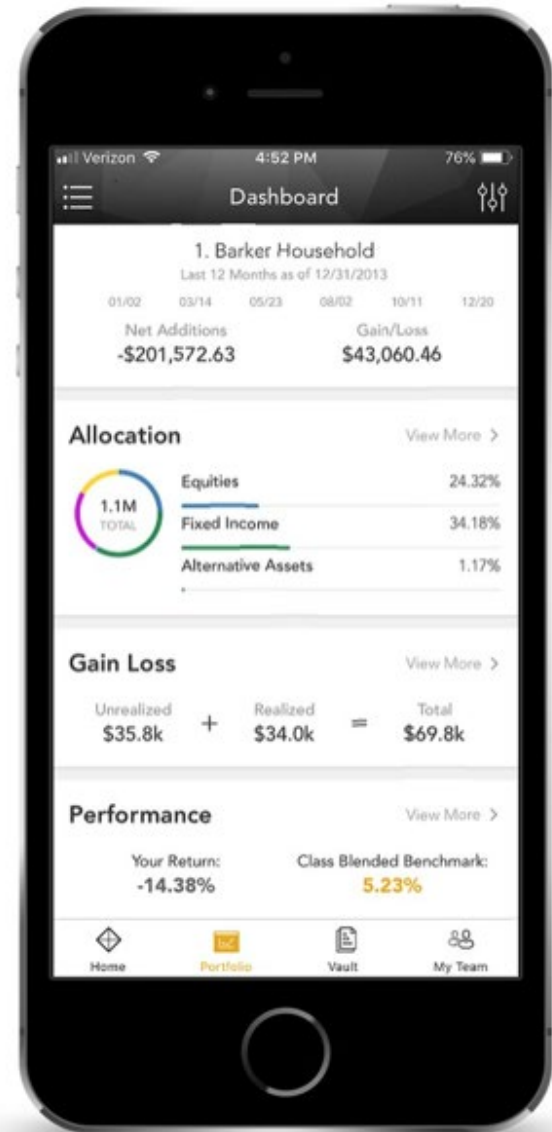
| Account Name | Custodian | Value | As of Date |
|--------------------|--------------|------------|------------|
| > Sample Account 4 | Fidelity IWS | 542,006.66 | 03/18/20 |
| > Sample Account 3 | Fidelity IWS | 298,699.05 | 03/18/20 |
| > Sample Account 2 | Fidelity IWS | 190,416.47 | 03/18/20 |
| > Sample Account 5 | Fidelity IWS | 25,899.30 | 03/18/20 |
| > Sample Account 1 | Fidelity IWS | 9,288.54 | 03/18/20 |

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.

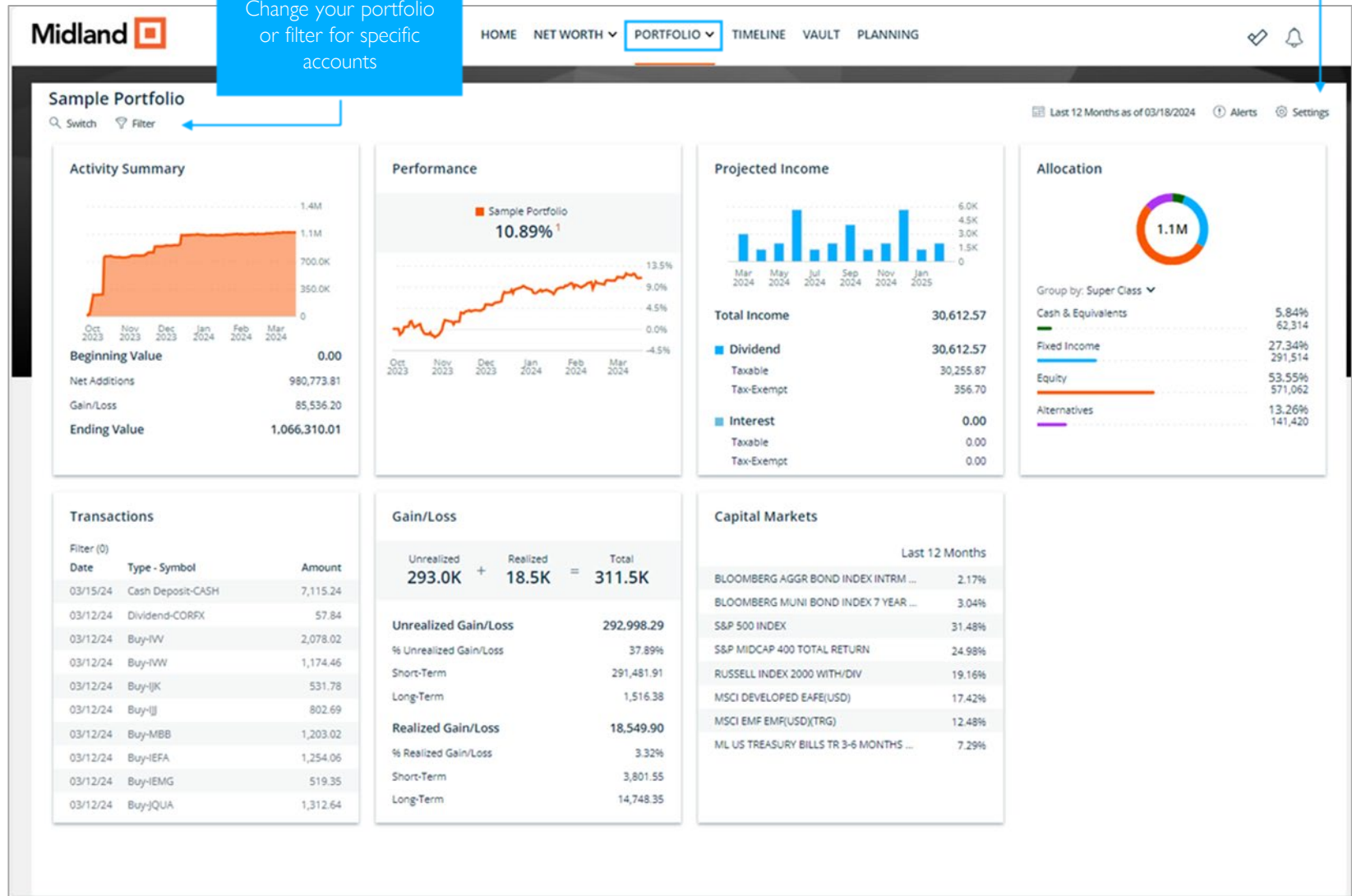
All of this is completely customizable using the filters to select specific date ranges, portfolios, or accounts.



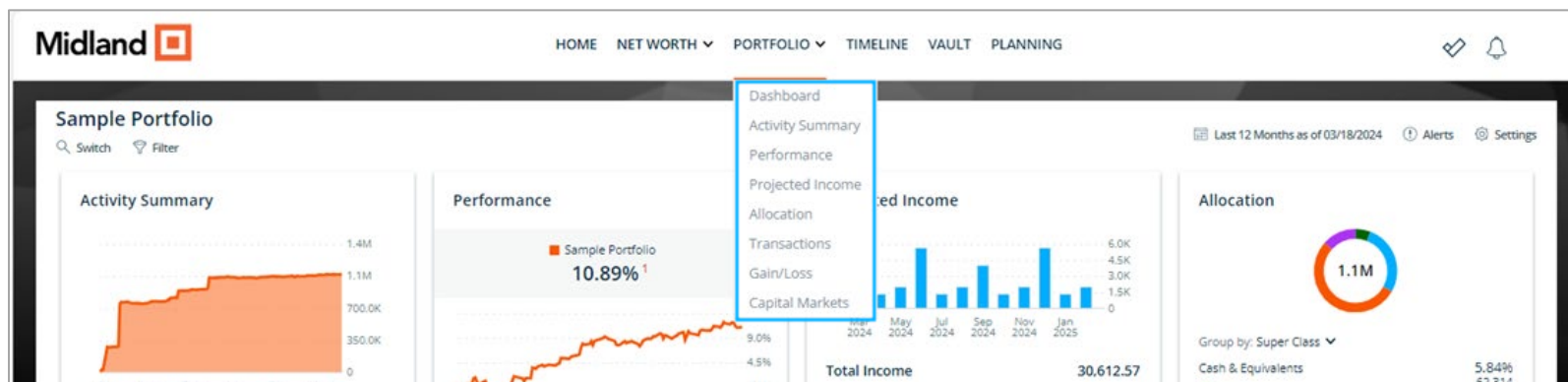
PORTFOLIO

Customize dashboard settings

Change your portfolio or filter for specific accounts



DASHBOARD



Activity Summary - View activity and changes in your portfolio or account balance

Performance Card* - View investment performance across your portfolio

Projected Income - Review a snapshot of expected dividend and interest payments

Allocation - View the allocation breakdown of your portfolio

Transactions - View and filter the most recent transactions in your portfolio

Gain Loss - View realized and unrealized gain/loss information for your investments

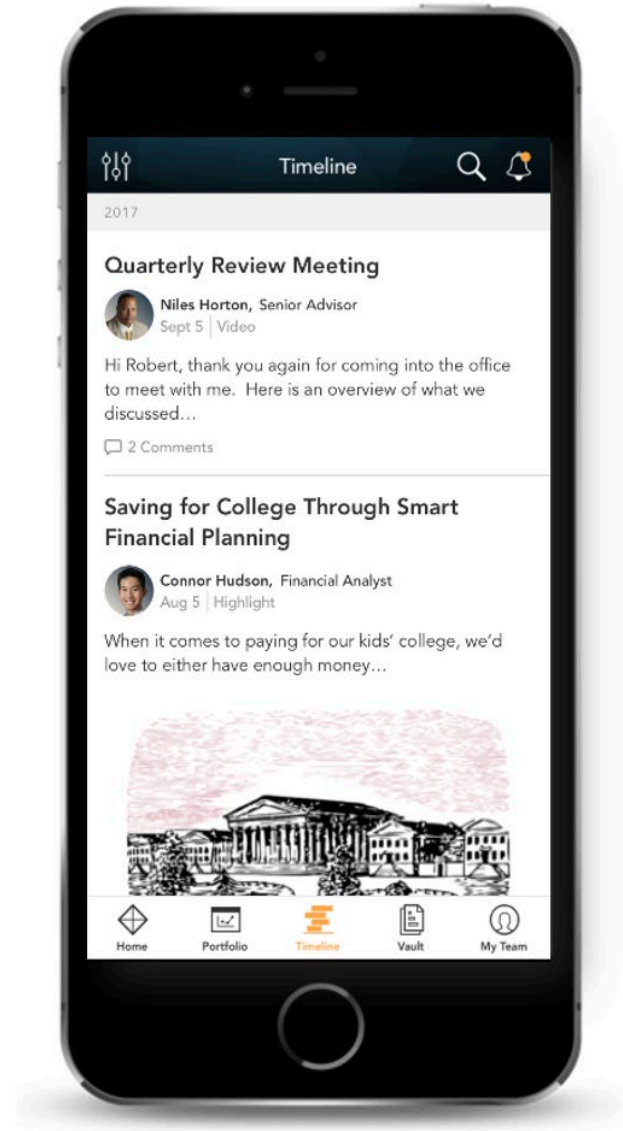
Capital Markets - View independent benchmark information across multiple date ranges

* Historical performance information available at a later date

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!



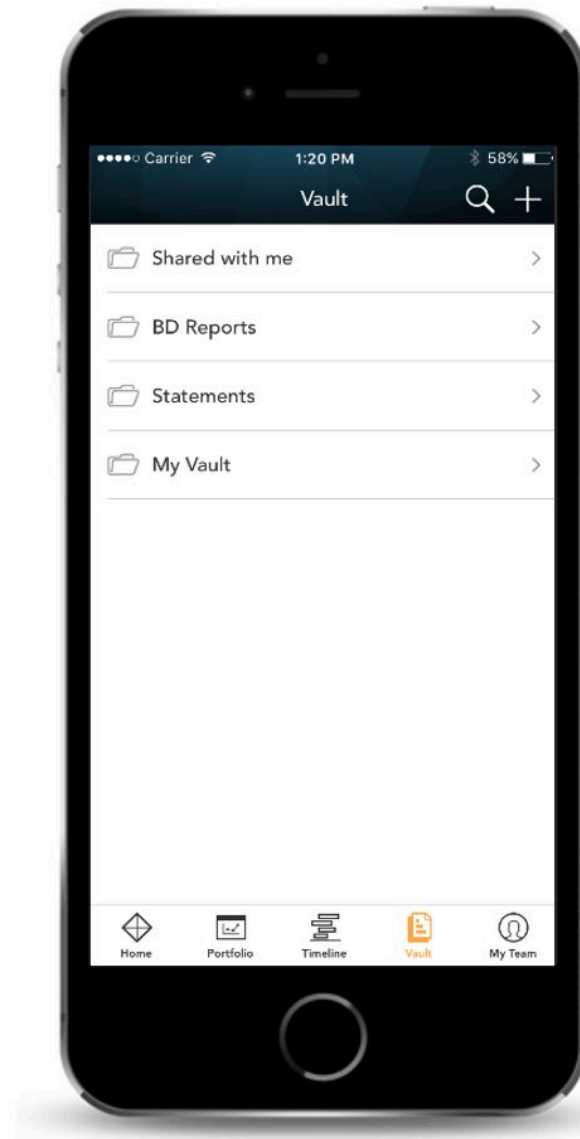
RELATIONSHIP TIMELINE

The screenshot displays the Midland Relationship Timeline interface. At the top, the navigation bar includes 'Midland' logo, 'HOME', 'NET WORTH', 'PORTFOLIO', 'TIMELINE' (highlighted), 'VAULT', and 'PLANNING'. Below the navigation bar, the 'Timeline' section features a search bar with the placeholder text 'Search post title' and a magnifying glass icon. A blue callout box points to the search bar with the text 'Search post content and titles'. The main content area is organized by month, starting with 'SEPTEMBER 2021'. The first post is titled 'Quarterly Review Meeting' by 'Andre Horton, Senior Advisor' (dated Sep. 2, 2021). The post content includes a greeting, a list of 'Topics Covered' (Performance, Tax and Income projections; Reviewed financial plan), 'Decisions Made' (Change investment strategy to Moderate from Aggressive; Open new 529 account for baby on the way!), and 'Tasks for you' (Sign account opening form for 529 account; Review new investment strategy with your wife, Helen). Below the post is a 'View Meeting' link and a 'View previous comments' link. The comments section shows two entries: one by 'Beatrice Clark, Tax Advisor' (Sep. 2, 2021) saying 'Great to see the progress!' and another by 'Harvey Page, Senior Financial Planner' (Sep. 2, 2021) saying 'We look forward to a great 2H of 2018. Hope to see you at the party next week!'. A comment input field with the initials 'RB' and the placeholder 'Leave a comment' is also visible. The next section is 'AUGUST 2021', featuring a post titled 'Look at Fidelity Advisor High Income Advantage I Fund (FAHCX)' by 'Andre Horton | Barker Family Relationship' (Senior Advisor, dated Aug. 2, 2021). The post content describes the fund's investment strategy. The final section is 'JULY 2021', with a post titled 'Deliver Wealth Midyear Market Review' by 'Harvey Page | Barker Family Relationship' (Senior Financial Planner, dated Jul. 6, 2021). The post content begins with 'We are already halfway through 2018! Please take a moment to watch our 2 minute mid-year market review video. Please let me'. A vertical scroll bar on the right side of the content area is highlighted with a blue double-headed arrow, and a blue callout box at the bottom right says 'Scroll to see post history'.

VAULT

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



VAULT

The screenshot displays the Midland Vault interface. At the top left is the Midland logo. The navigation bar includes links for HOME, NET WORTH, PORTFOLIO, TIMELINE, VAULT (highlighted with a blue box), and PLANNING. On the right of the navigation bar are icons for a checkmark and a bell. Below the navigation bar, the main content area is titled 'Statements' with a folder icon. A search bar is located in the top right of this section. On the left side, there are navigation options: 'Shared With Me', 'Reports', and 'Statements' (which is selected). The main area contains a table with the following headers: Name, Portfolio / Account, Start Date, End Date, File Size, and Date Posted. Above the table, it indicates '0 document(s) selected' and a 'Download' button.

| <input type="checkbox"/> | Name | Portfolio / Account | Start Date | End Date | File Size | Date Posted |
|--------------------------|------|---------------------|------------|----------|-----------|-------------|
|--------------------------|------|---------------------|------------|----------|-----------|-------------|

PLANNING

View information from your Financial Plan including the Probability of Success

HOME
NET WORTH ▾
PORTFOLIO ▾
TIMELINE
VAULT
PLANNING

Sample Portfolio As of 03/19/24

[Switch](#)

MoneyGuidePro

Current Scenario

99% Probability of Success
Above Confidence Zone

Recommended Scenario

99% Probability of Success
Above Confidence Zone

| Retirement | | |
|--|-----------------------|-----------------------|
| Retirement Age | | |
| Jack | 62 in 2021 | 62 in 2021 |
| Jill | 60 in 2021 | 60 in 2021 |
| Planning Age | | |
| Jack | 91 in 2050 | 62 in 2021 |
| Jill | 93 in 2054 | 93 in 2054 |
| Goals | | |
| Needs | | |
| Health Care | | |
| Both Retired Before Medicare | \$12,000 | \$12,000 |
| Jack Medicare / Jill Retired Before Medicare | \$8,771 | \$0 |
| Both Medicare | \$5,515 | \$0 |
| Jill Alone Retired Before Medicare | \$0 | \$6,000 |
| Jill Alone Medicare | \$2,614 | \$2,733 |
| Retirement - Basic Living Expense | | |
| Both Retired | \$72,000 | \$72,000 |
| Jill Alone Retired | \$58,000 | \$72,000 |
| Wants | | |
| Washington/Pacific Northwest Home | \$400,000 | \$400,000 |
| Starting | 2022 | 2022 |
| Wishes | | |
| Travel | \$10,000 | \$10,000 |
| Starting | When both are retired | When both are retired |
| Years between occurrences | 1 | 1 |
| Number of occurrences | 20 | 20 |

LOGIN PROBLEMS

How to access your account if you have trouble signing in to the site

The screenshot shows a login form with fields for 'Username' and 'Password', a 'Sign In' button, and a 'Trouble Logging In?' link. To the right, two error messages are displayed: 'Error! Invalid username and password combination.' and 'Error! Your user account has been locked. Please click "Trouble logging in?" to unlock your account.' Further right, a 'Trouble logging in?' section titled 'What's the problem?' contains three buttons: 'I forgot my password.', 'I forgot my username.', and 'I need to unlock my account.'

Select "Trouble Logging In?" on the Sign In page for help

You will receive an email with a link to access the site
Follow the steps provided to resolve login issues

The email is from Midland and is addressed to 'Dear [Name]'. It contains the following text: 'Please click on the following to reset your password:' followed by a 'Reset Password' button. Below that, it says 'Or, paste this link into your browser:' followed by a link placeholder '>{{Link}}' and an expiration detail placeholder '>{{ExpirationDetail}}'. At the bottom, it states: 'If you did not request this password reset, please contact your administrator.'

Midland 

DISCLOSURES

Midland Wealth Management is a trade name used by Midland States Bank, Midland Trust Company, and Midland Wealth Advisors, LLC, a registered investment adviser.

Investments are not insured by the FDIC or any other government agency, are not deposits or obligations of the bank, are not guaranteed by the bank or any federal government agency, and are subject to risks, including the possible loss of principal.