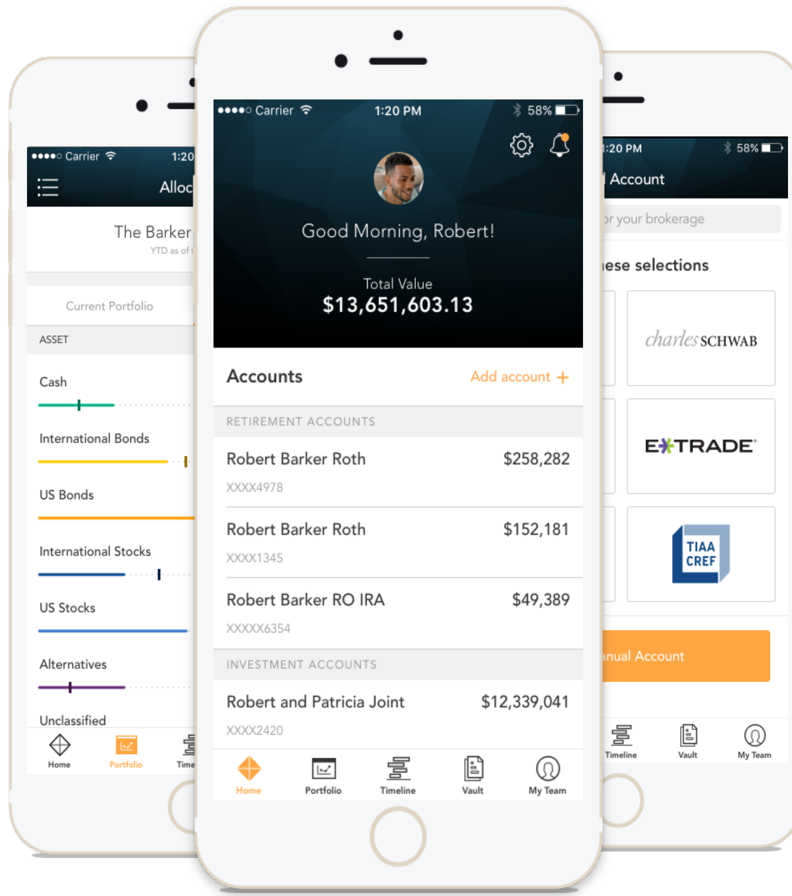
Midland

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

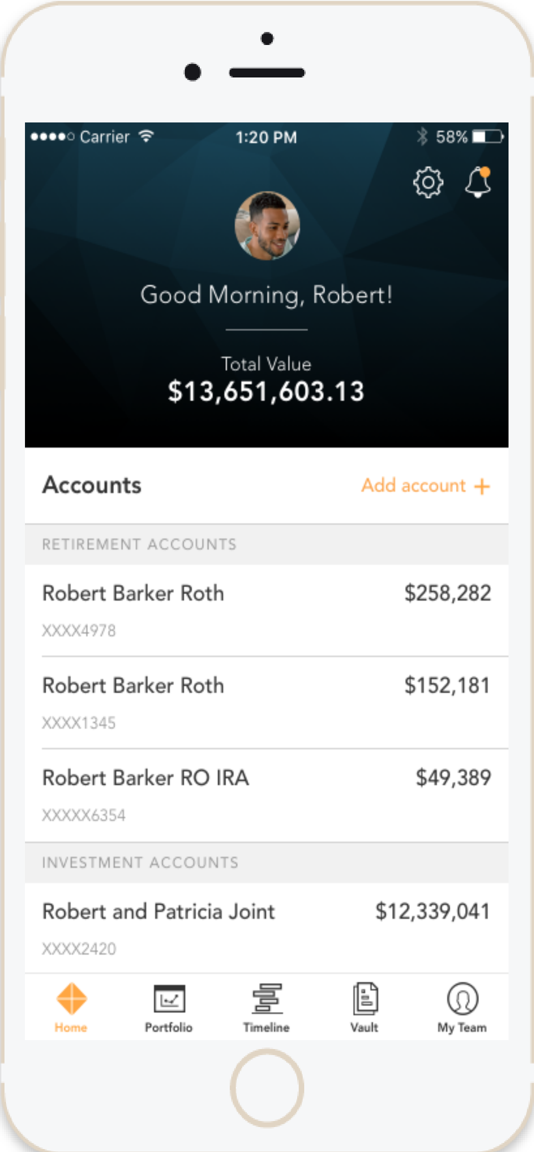
HOMEPAGE

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.

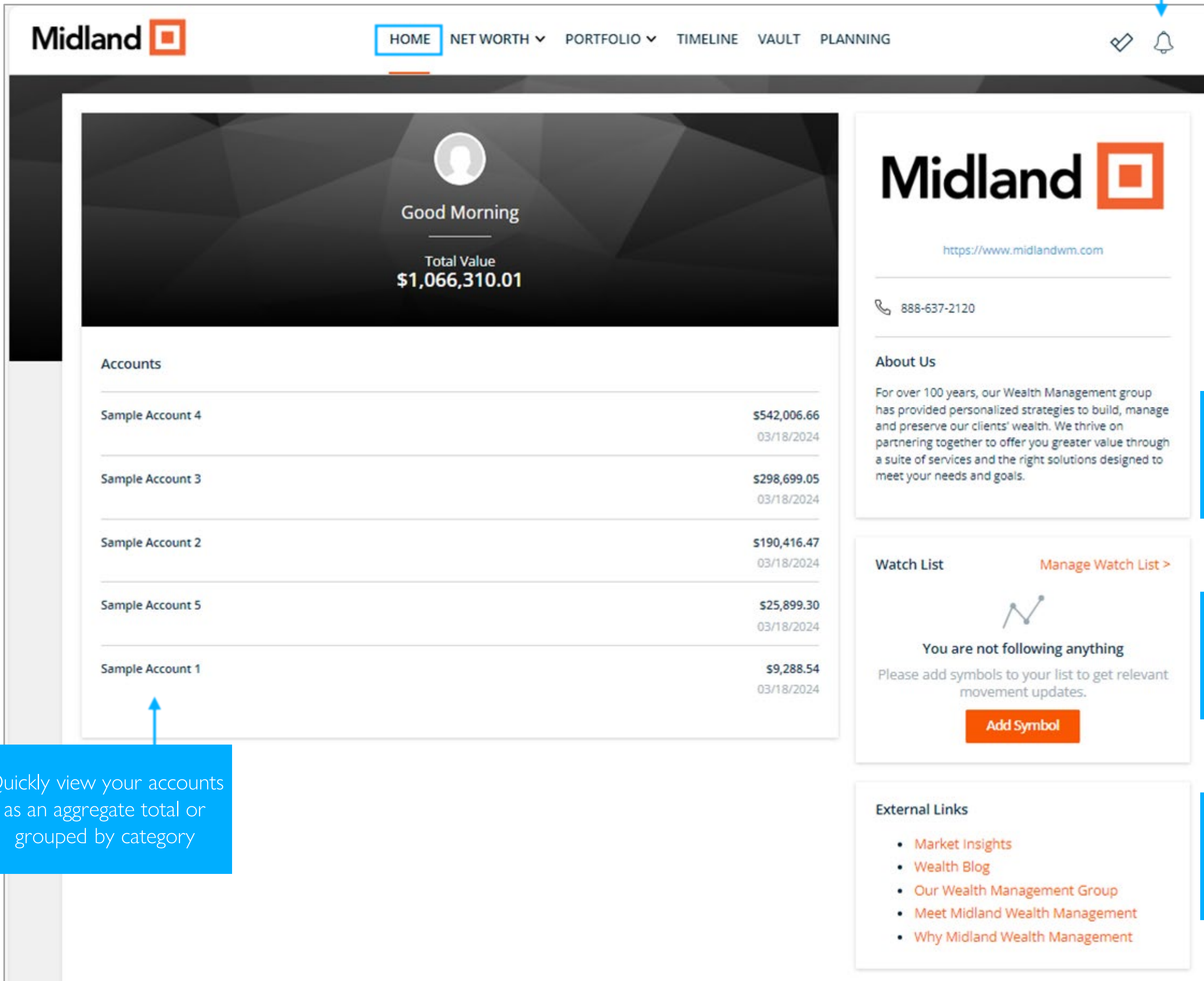
You can stay connected to your financial team with clickable links to phone numbers, emails, and office locations.

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



Communicate or schedule an appointment with your financial team directly

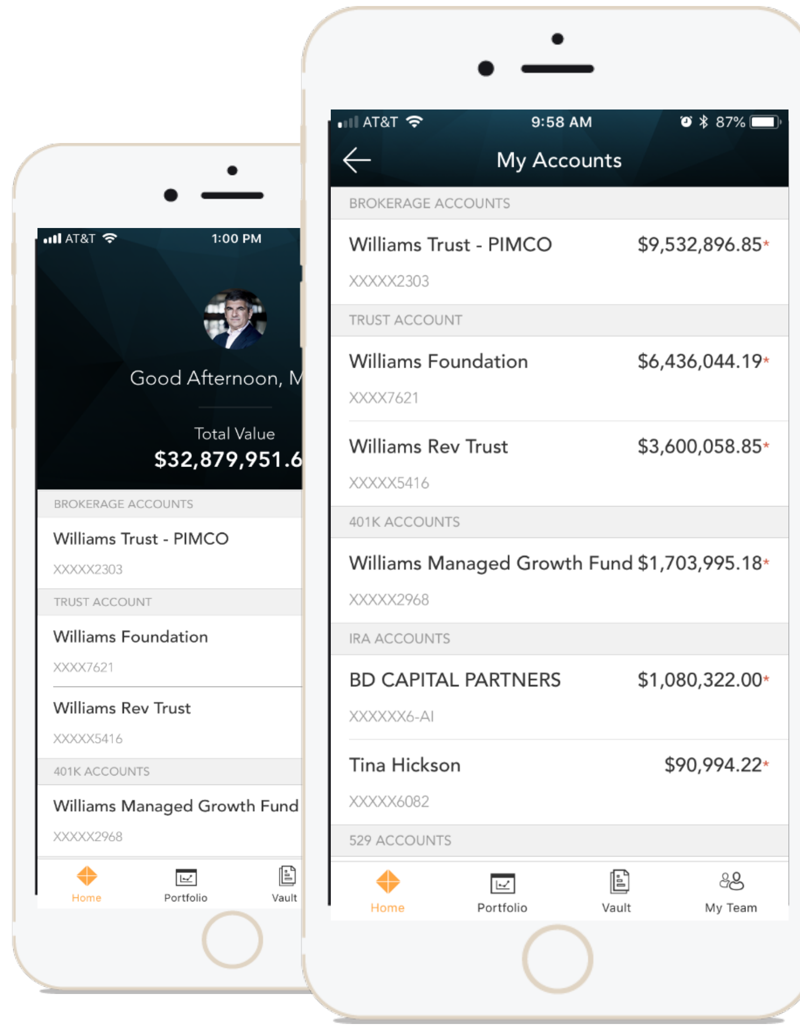
Pick and choose stocks, ETF and mutual funds that matter to you to track daily

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

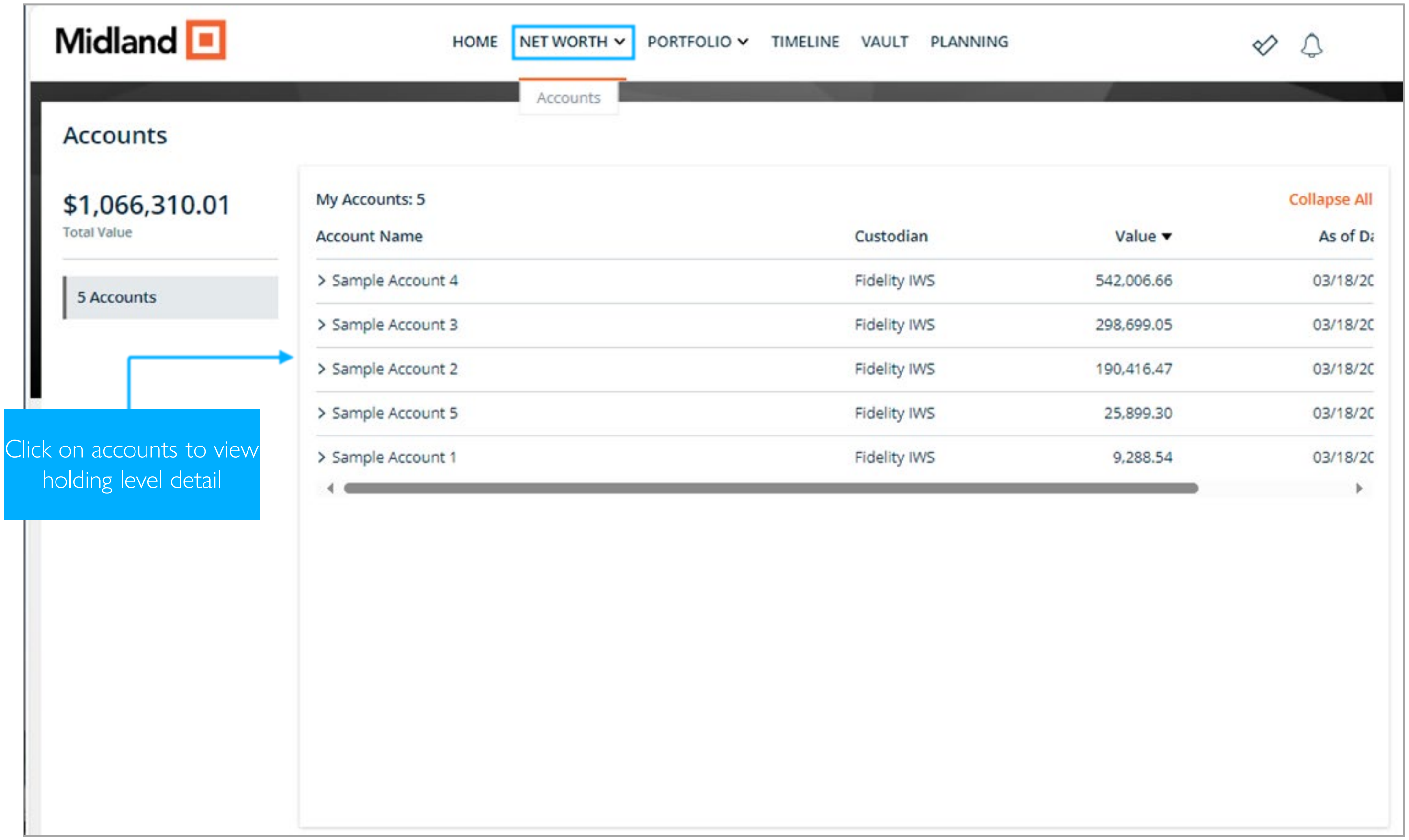
Quickly view your accounts as an aggregate total or grouped by category

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

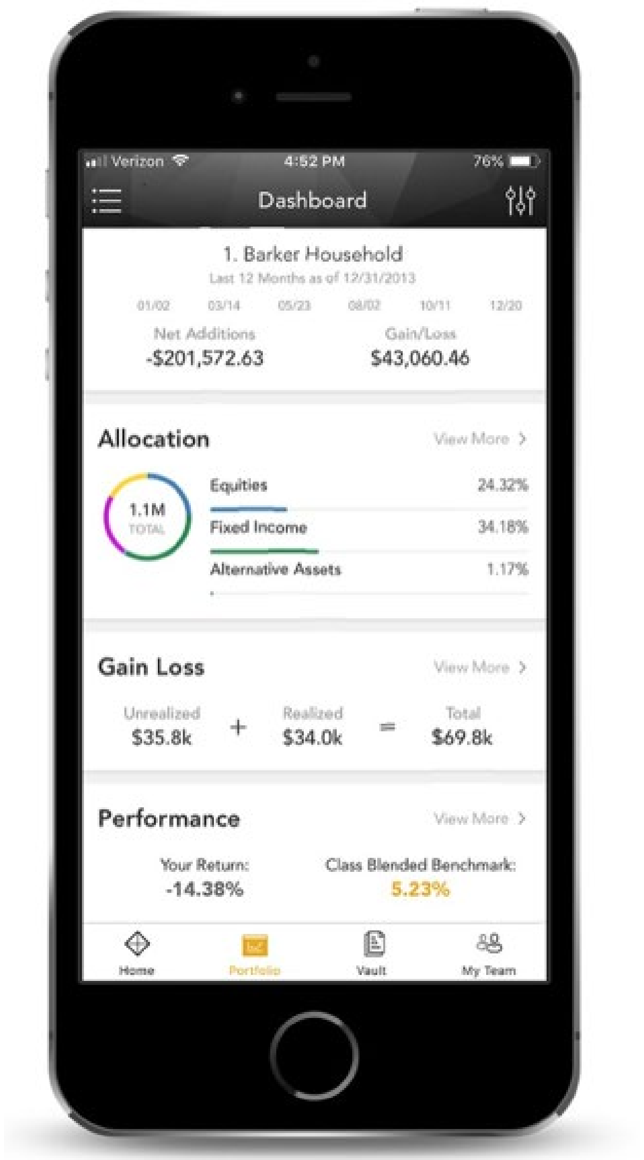

Midland
HOME
NET WORTH
PORTFOLIO
TIMELINE
VAULT
PLANNING
Accounts
Accounts
$1,066,310.01
Total Value
5 Accounts
My Accounts: 5
Collapse All
Account Name
Custodian
Value
As of Da
Sample Account 4
Fidelity IWS
542,006.66
03/18/20
Sample Account 3
Fidelity IWS
298,699.05
03/18/20
Sample Account 2
Fidelity 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
Click on accounts to view holding level detail

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.

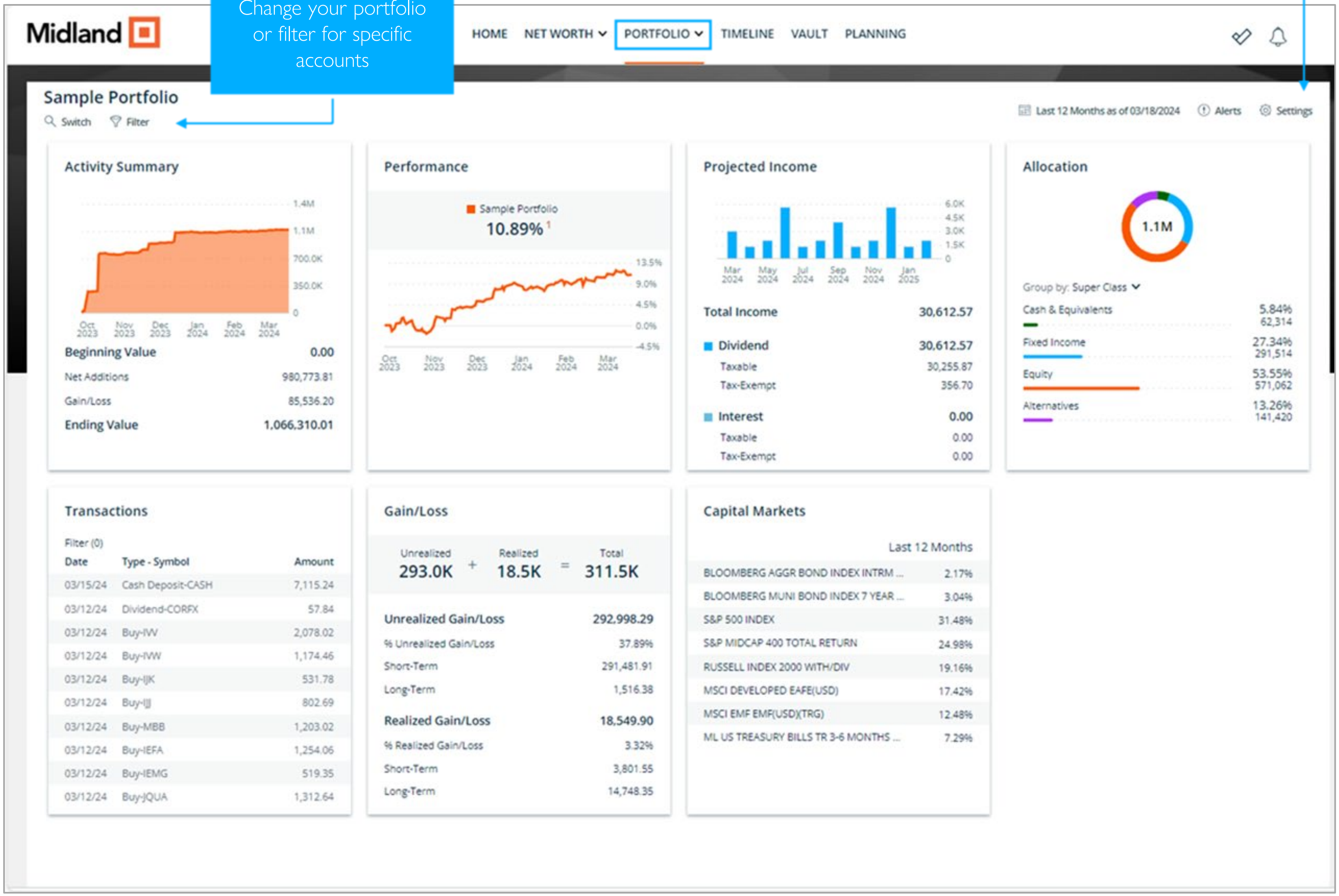
All of this is completely customizable using the filters to select specific date ranges, portfolios, or accounts.



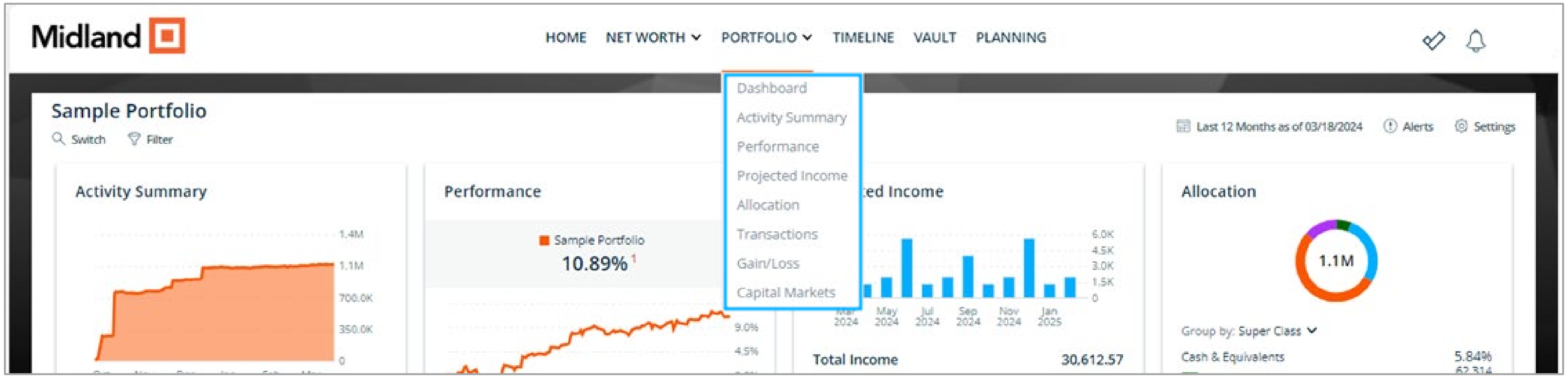
PORTFOLIO

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

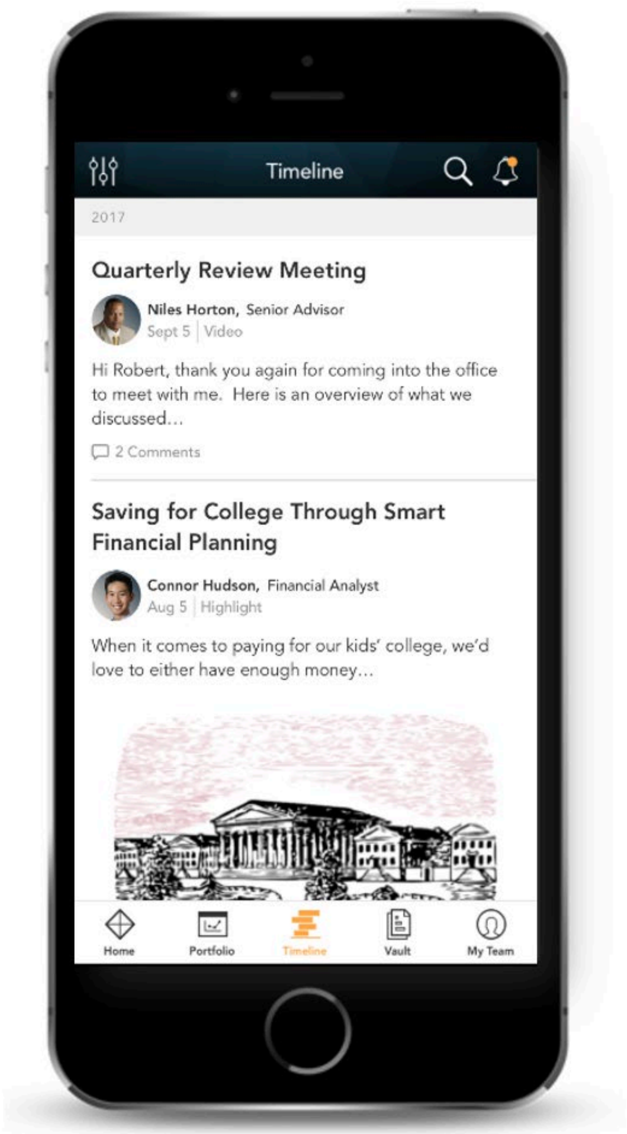
Capital Markets - View independent benchmark information across multiple date ranges

* Historical performance information available at a later date

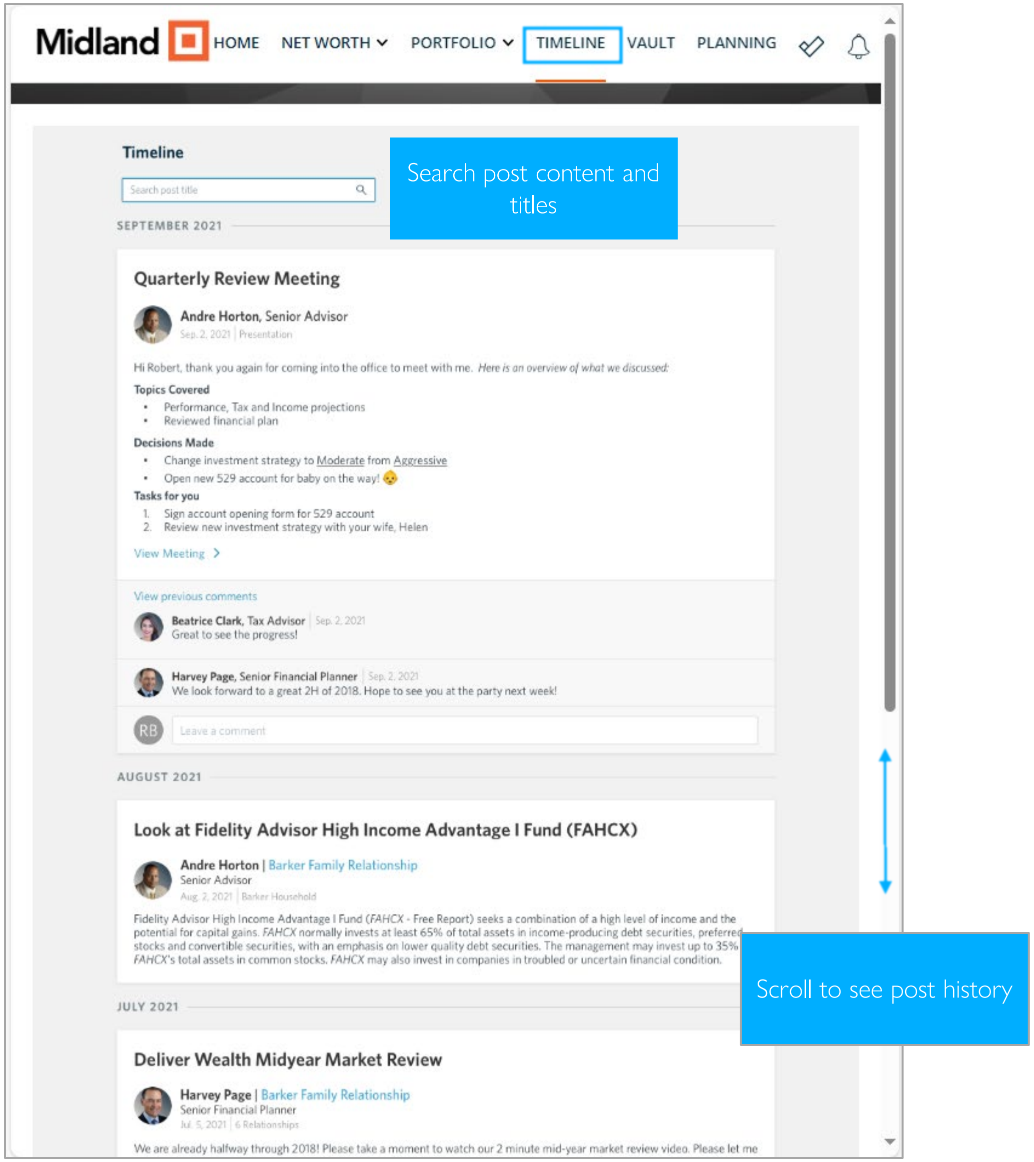
RELATIONSHIP TIMELINE

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!



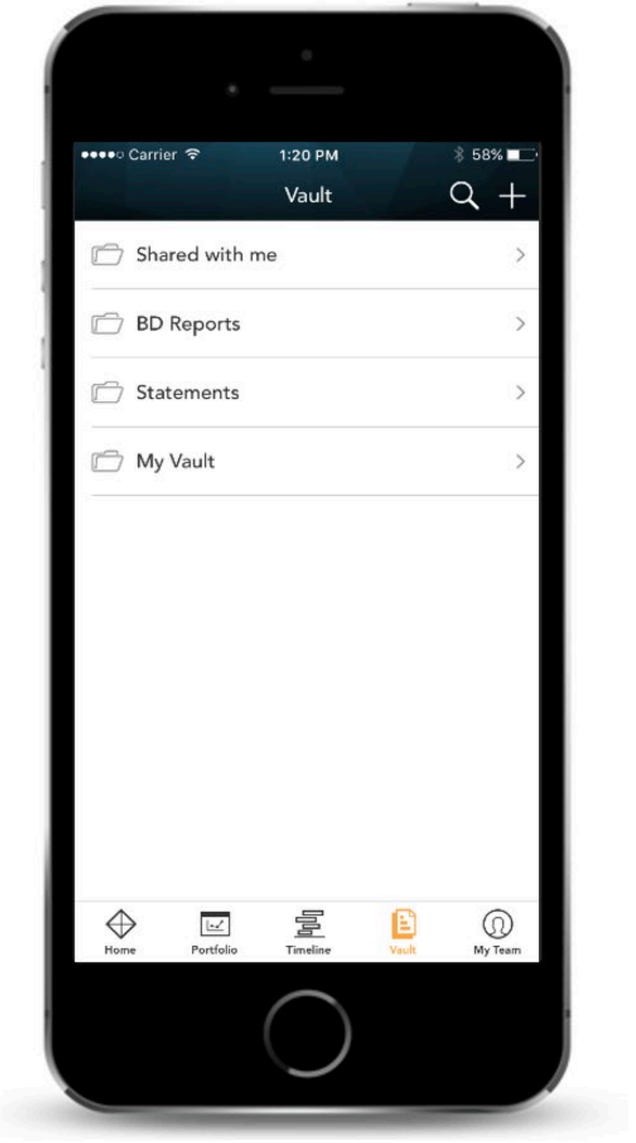
RELATIONSHIP TIMELINE



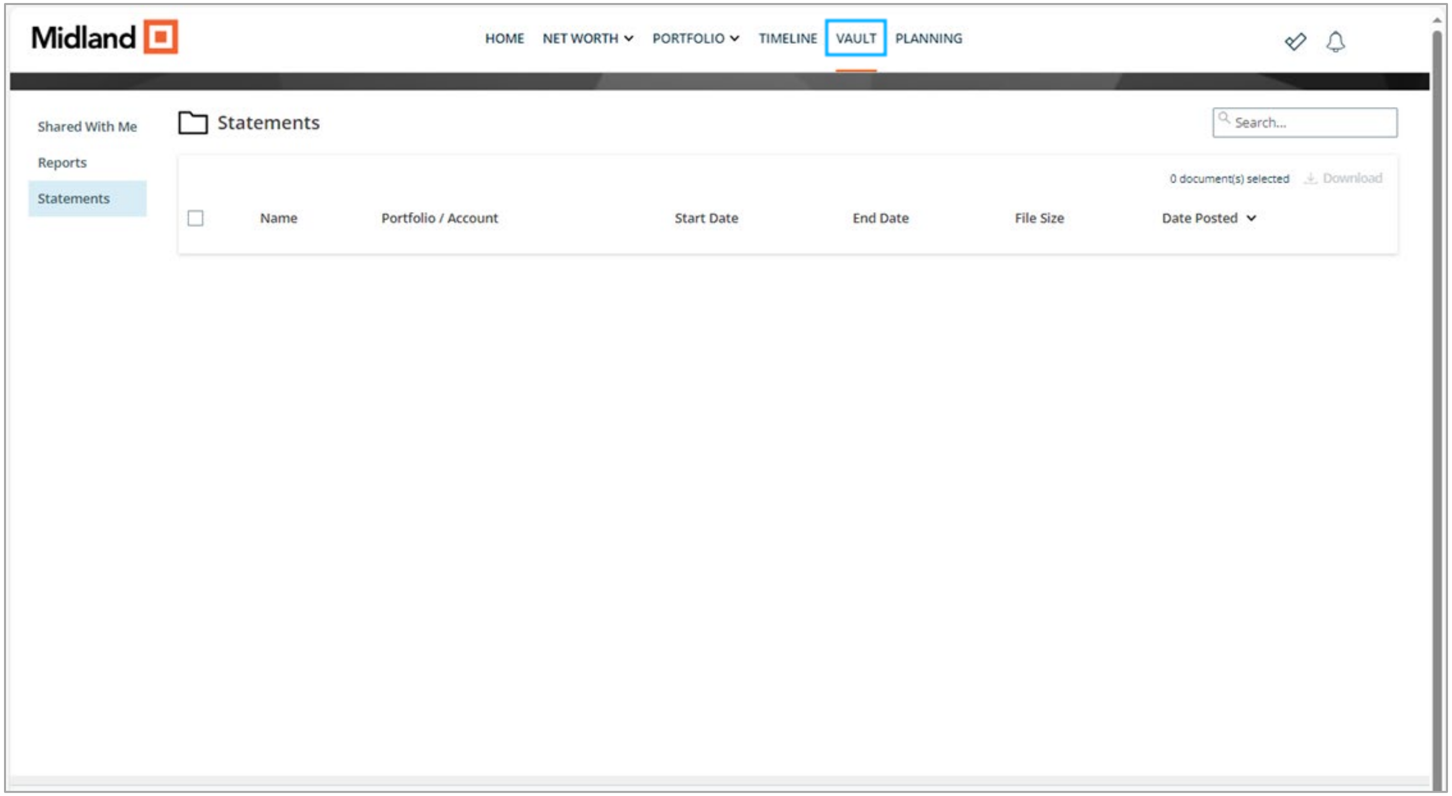
VAULT

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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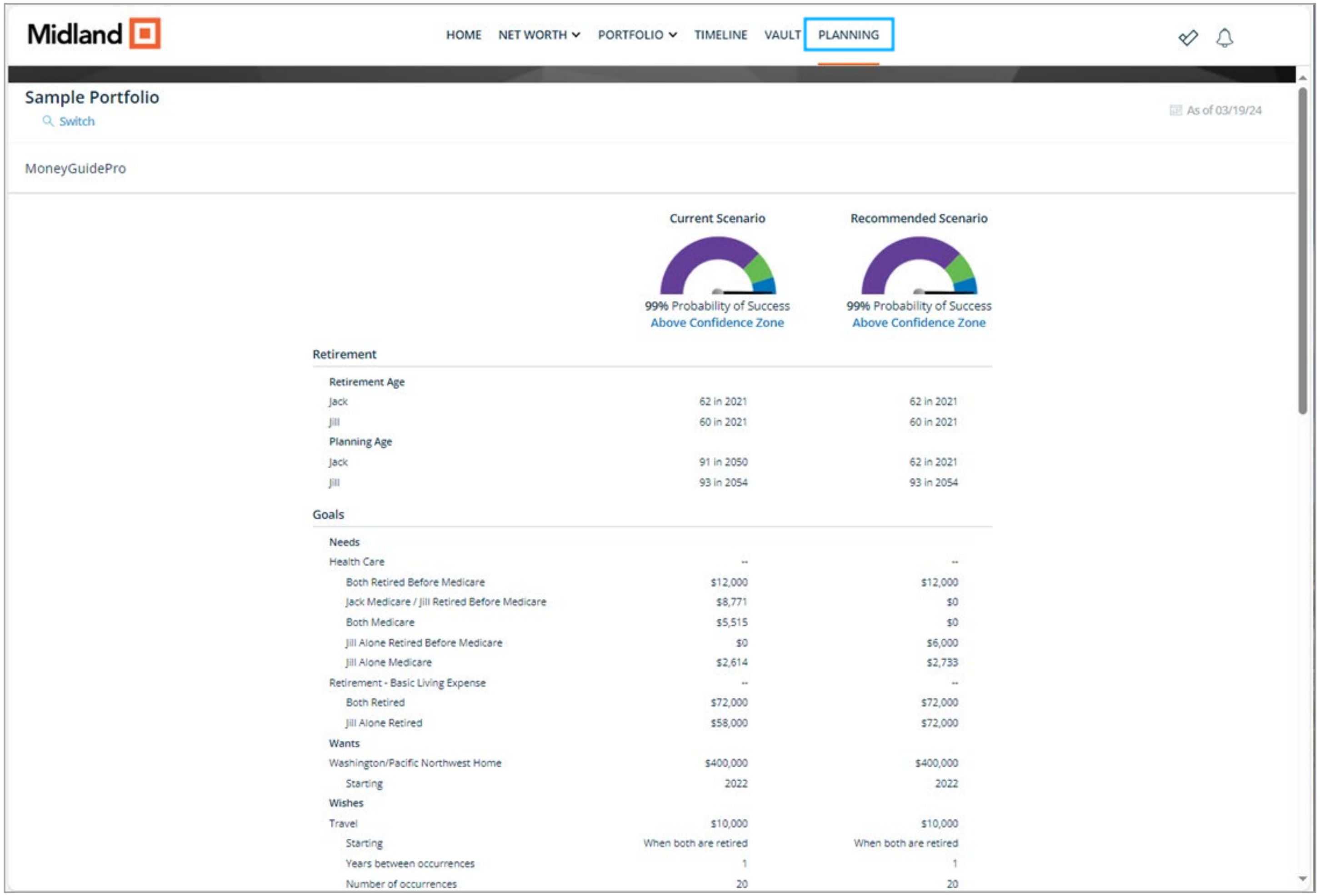
HOME
NET WORTH
PORTFOLIO
TIMELINE
VAULT
PLANNING
Shared With Me
Reports
Statements
Statements
Search...
0 document(s) selected
Download
Name
Portfolio / Account
Start Date
End Date
File Size
Date Posted

PLANNING

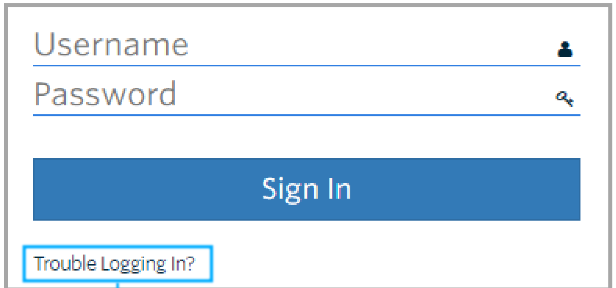
View information from your Financial Plan including the Probability of Success

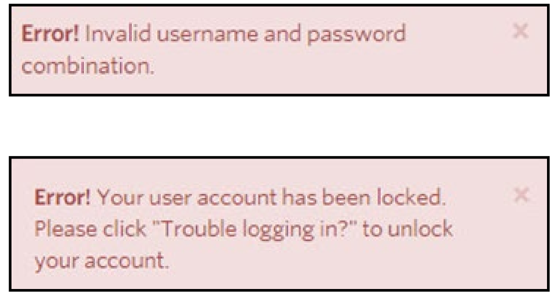


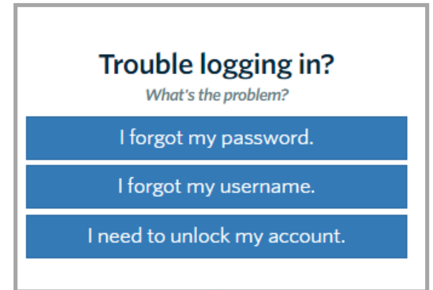
	Current Scenario	Recommended Scenario
Retirement		
Retirement Age		
Jack	62 in 2021	62 in 2021
Jill	60 in 2021	60 in 2021
Planning Age		
Jack	91 in 2050	62 in 2021
Jill	93 in 2054	93 in 2054
Goals		
Needs		
Health Care	--	--
Both Retired Before Medicare	$12,000	$12,000
Jack Medicare / Jill Retired Before 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

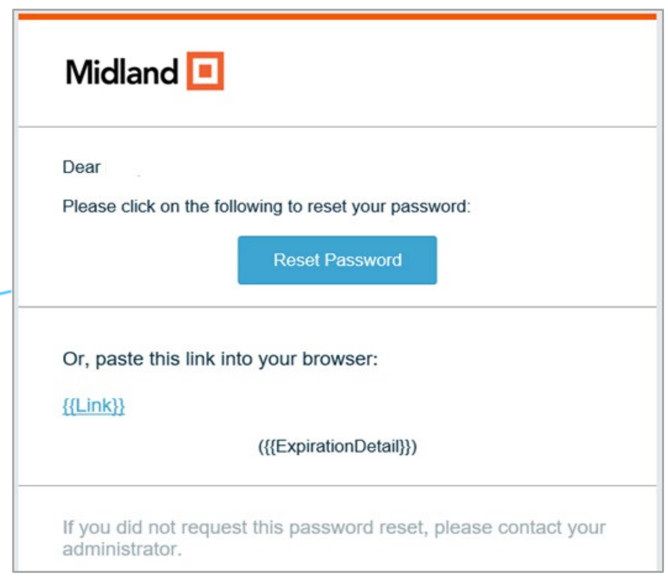
How to access your account if you have trouble signing in to the site







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

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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.

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