This document will initially provide a summary of each Web site and the purpose for each. Frequently Asked Questions and responses will follow – Thank you for reading this note.

## Sharefile Web Site

Sharefile provides Capstone client accessible document storage and secure communication. Starting in August 2013, your monthly TD Ameritrade statements are automatically uploaded within 1 week of month end. Quarterly Reports will be uploaded to the Blueleaf section with 10 days of the quarter end.

The document storage capability Sharefile enables Capstone to securely post reports and financial planning data to your unique portal. Sharefile also allows for your important documents (i.e. Will, Trust Documents) to be uploaded to the site for quick off-site access.

## Blueleaf Web Site

Blueleaf is our Portfolio Reporting Software that provides a summary of your account values from TD Ameritrade and from other accounts if you have them. Portfolio Performance Reports can be run for any time period as you desire.

Blueleaf offers a weekly e-mail summary that provides a concise update of your account balances for the past week.

Also if you want to learn more about your investment holdings you can access the Morningstar financial database that is linked to Blueleaf. Under the holdings section you can click the blue symbol for the investment.

## TD Ameritrade Web Site

The TD Ameritrade web site allows you to access your TD Ameritrade Trade Confirmations, Monthly Statements, along with current holdings and values for your TD Ameritrade account. This is the place were older (than August 2013) TD Ameritrade Statements be accessed.

The TD Ameritrade Web Site can be accessed at www.advsiorclient.com

# Frequently Asked Questions:

This section will be expanded in the future:

If you have any immediate questions, please e-mail Bill Sigrist or call:

bill@capstoneinvest.com

719-477-9883 Ext 801.

Thank you.