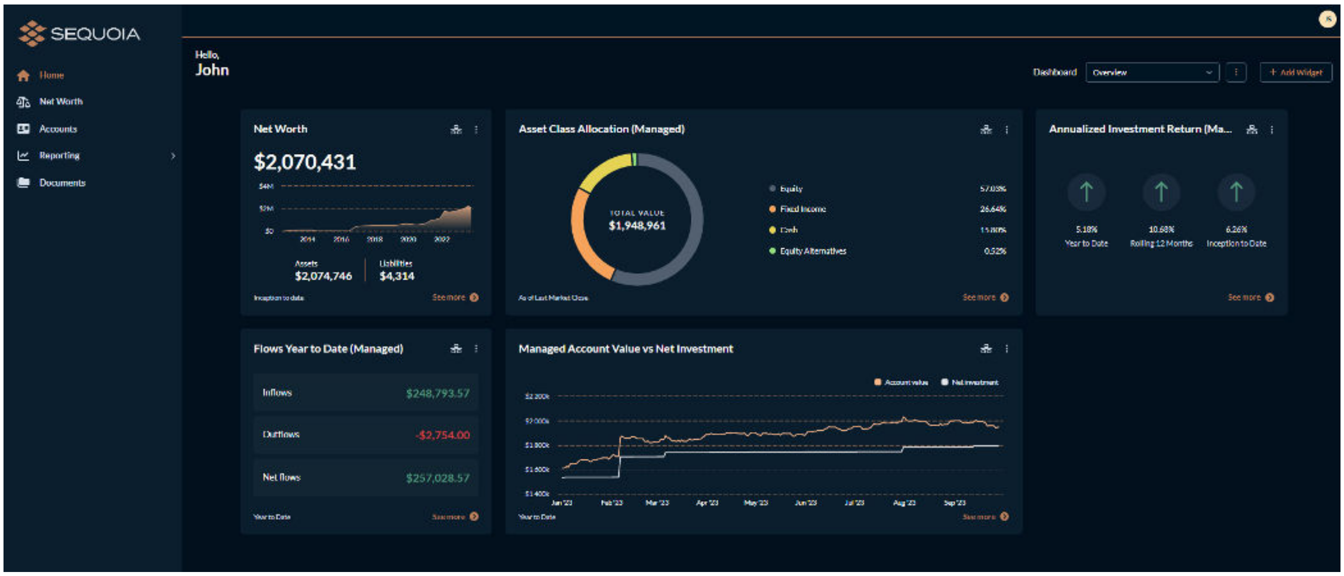
SEQUOIA FINANCIAL GROUP

Sequoia Connect Quickstart Guide

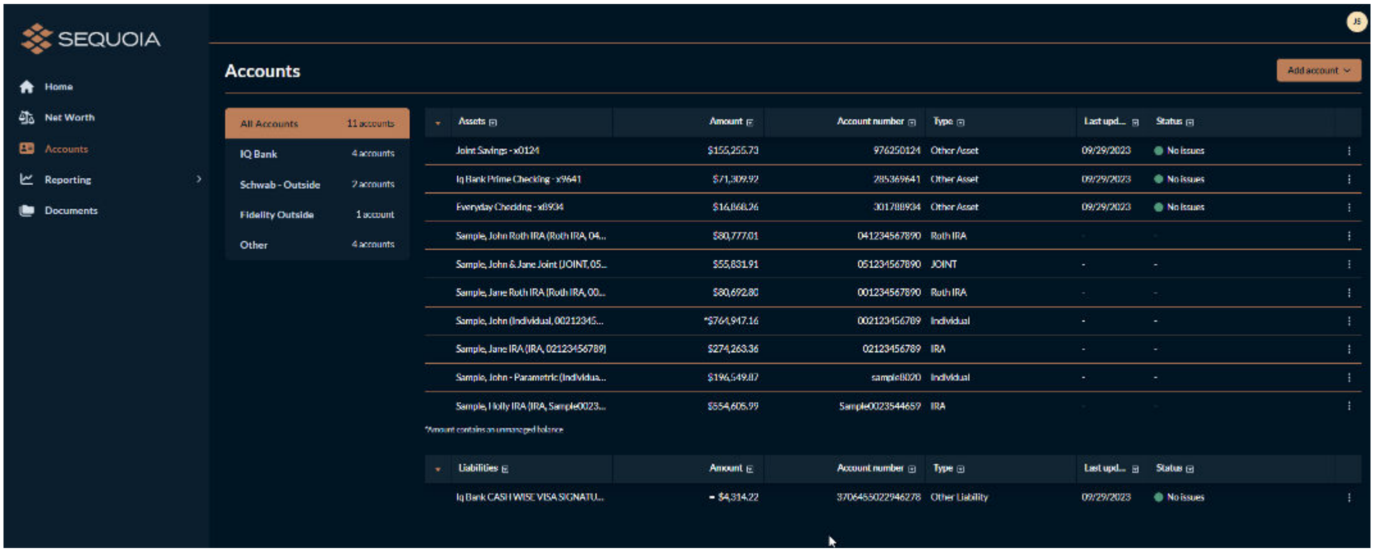
Welcome! Sequoia Connect is a platform to help you manage financial needs with your advising team.

DASHBOARD • See the big picture with your homepage. View key investment information at a glance and create personalized dashboards.



REPORTS • Dive into the details with comprehensive reporting. Sort options and date filters provide customizable investment detail for you and your advising team.

ACCOUNTS • Build your balance sheet by linking your external accounts. Securely link other financial assets for a complete view of your wealth in real time. Linked assets allow your advisors to deliver up-to-the-moment financial plans.



SEQUOIA FINANCIAL GROUP

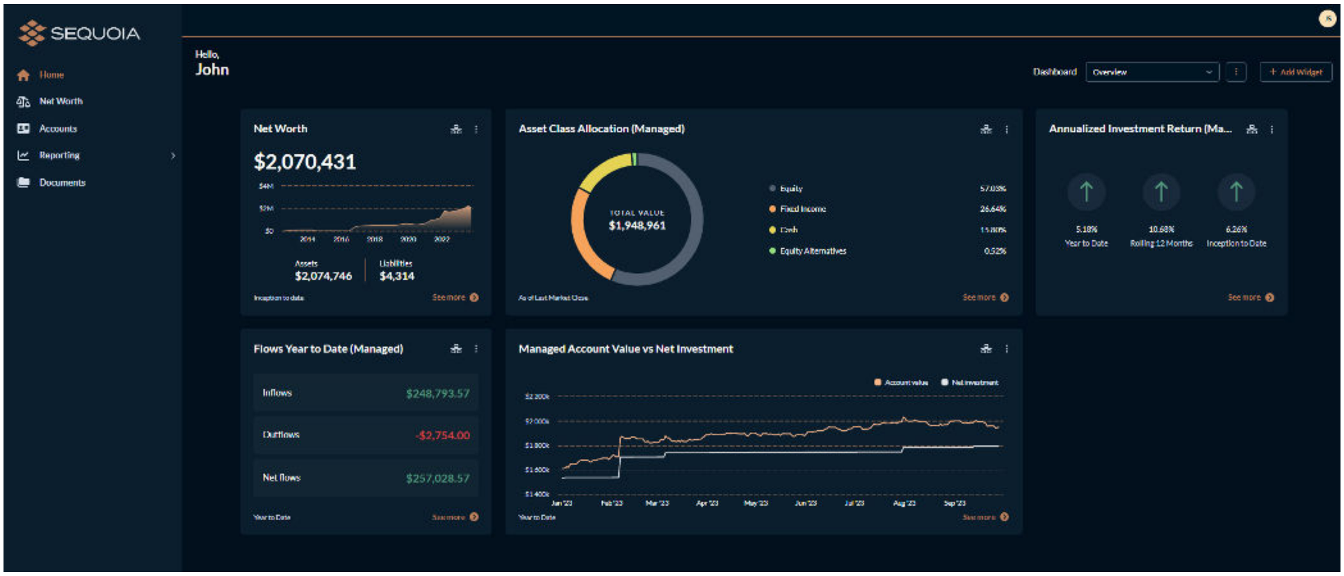
Already a User? Log in at sequoia-financial.com/client-portal
New User? Contact your advising team to get started today!

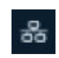
Download our mobile app:
Search "Sequoia Connect" in the Apple or Google Play stores.

The consolidated report is provided for informational purposes as a courtesy to you. We recommend that you review your plan annually, unless changes in your personal or financial circumstances require more frequent review. While we have taken great care in the preparation of these materials, we cannot be responsible for clerical, computational, or other errors. It is important to compare the information on this report with the statements you receive from the custodian(s) for your account(s). Investment advisory services offered by Sequoia Financial Advisors, LLC, an SEC Registered Investment Advisor. Registration as an investment advisor does not imply a certain level of skill or training.

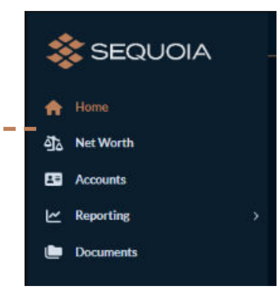
Navigation Basics

HOMEPAGE

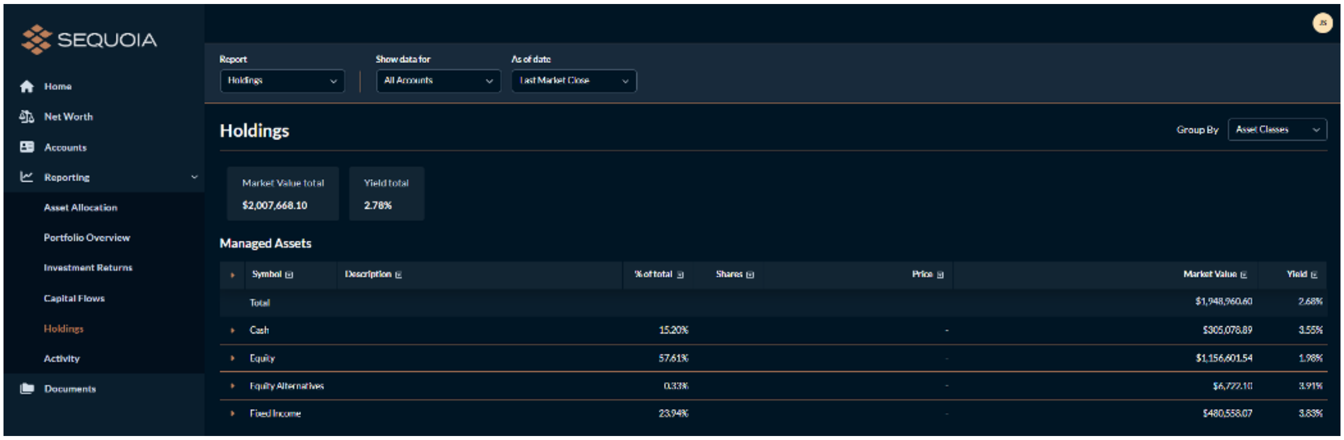


1. To check what accounts a widget is reporting, click the pyramid icon  at the top right of each widget.

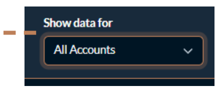
2. Use the options in the top right of the page to create a new dashboard, switch between views you've built, and change other settings.
3. Click 'See More' on any widget to view a full report.
4. Select the page you need with the Main Menu.



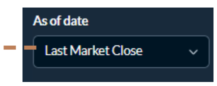
REPORTS



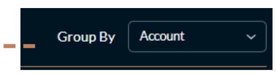
1. Use the “Show Data for” dropdown to select the account or group displayed.



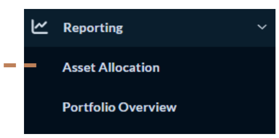
2. Select your report dates, or create a custom one (not available in all reports).



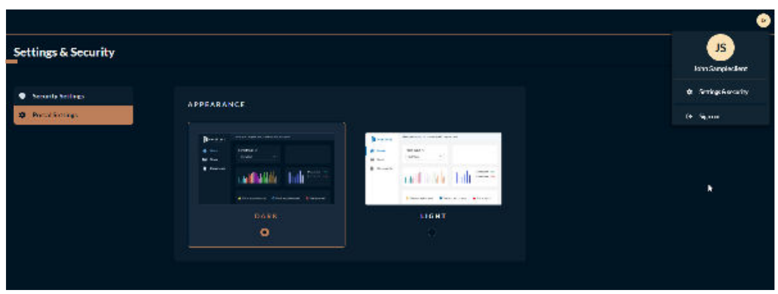
3. Change how data is displayed with the “Group By” option. (Not available in all reports).



4. Switch between reports within the Main Menu.



5. Click your initials in the upper corner and select Settings & Security to update your password, change display themes, and more.



SEQUOIA FINANCIAL GROUP

Already a User? Log in at sequoia-financial.com/client-portal
New User? Contact your advising team to get started today!

Download our mobile app:
Search “Sequoia Connect“ in the Apple or Google Play stores.

The consolidated report is provided for informational purposes as a courtesy to you. We recommend that you review your plan annually, unless changes in your personal or financial circumstances require more frequent review. While we have taken great care in the preparation of these materials, we cannot be responsible for clerical, computational, or other errors. It is important to compare the information on this report with the statements you receive from the custodian(s) for your account(s). Investment advisory services offered by Sequoia Financial Advisors, LLC, an SEC Registered Investment Advisor. Registration as an investment advisor does not imply a certain level of skill or training.