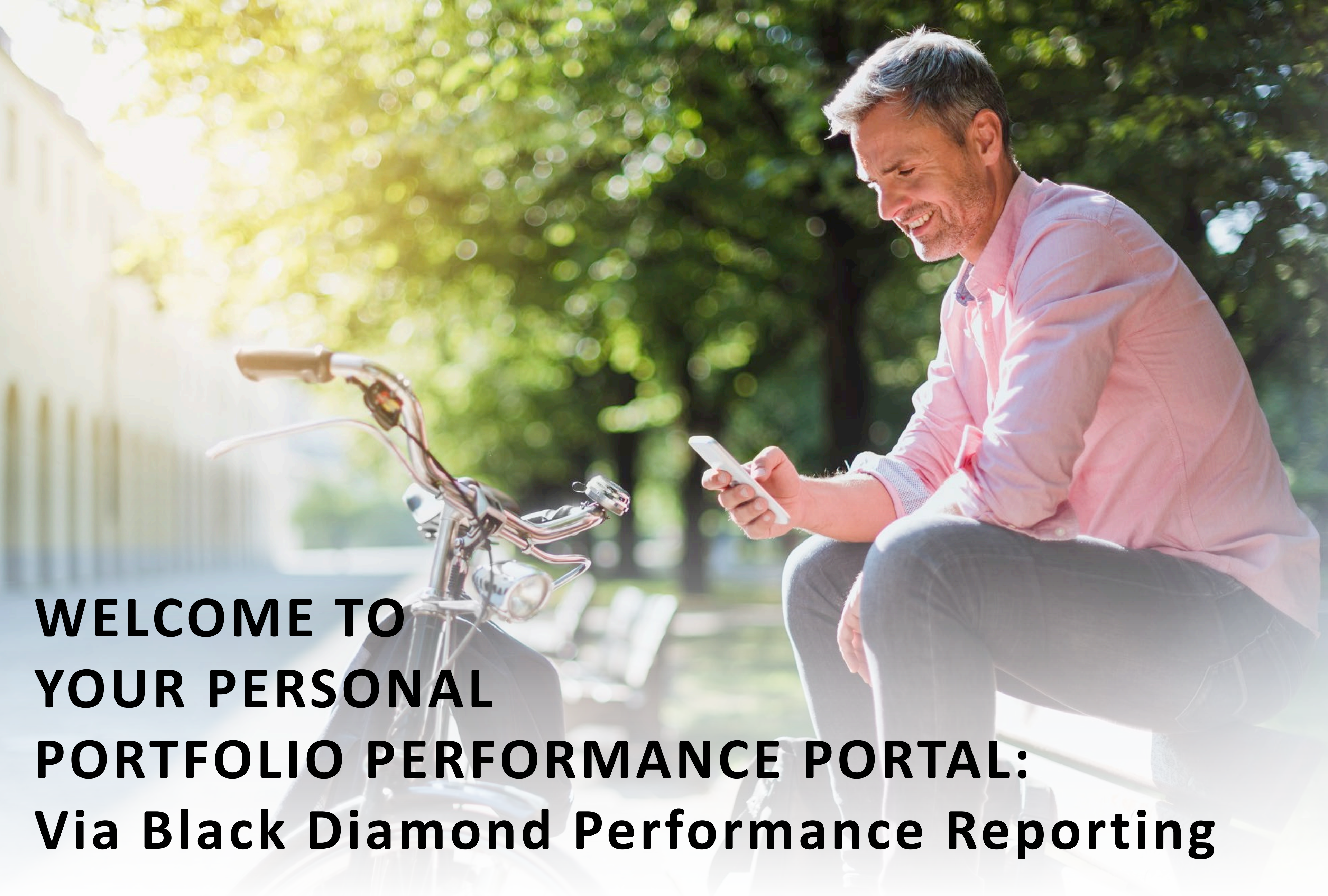


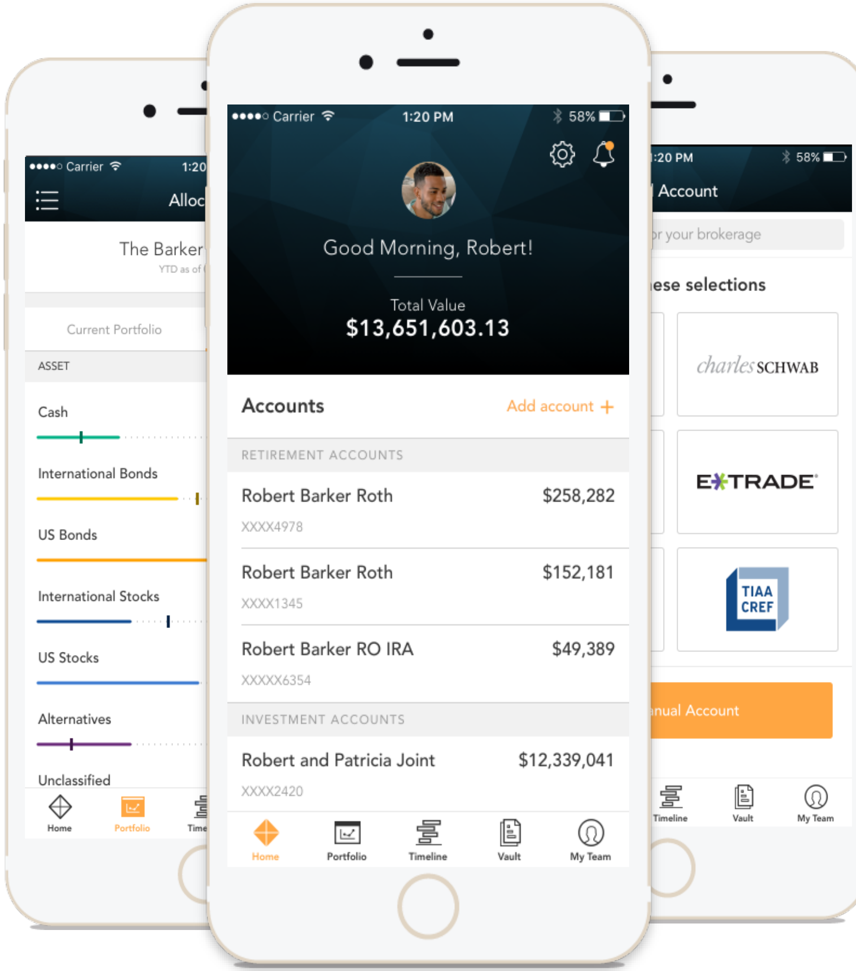
WELCOME TO YOUR PERSONAL PORTFOLIO PERFORMANCE PORTAL:

Via Black Diamond Performance Reporting

PARAGON WEALTH STRATEGIES

Personalized For You

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



Stay Connected to Your Financial Picture

Home Page	At-a-glance view of pertinent account information
Portfolio	Dynamic view of your entire portfolio
My Accounts	Detailed list of your accounts
Login Questions	Helpful hints

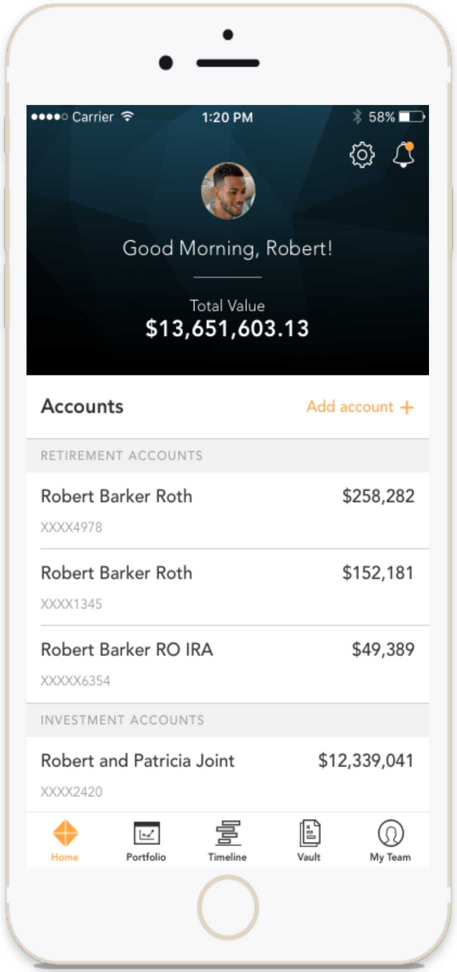
Home Page

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.

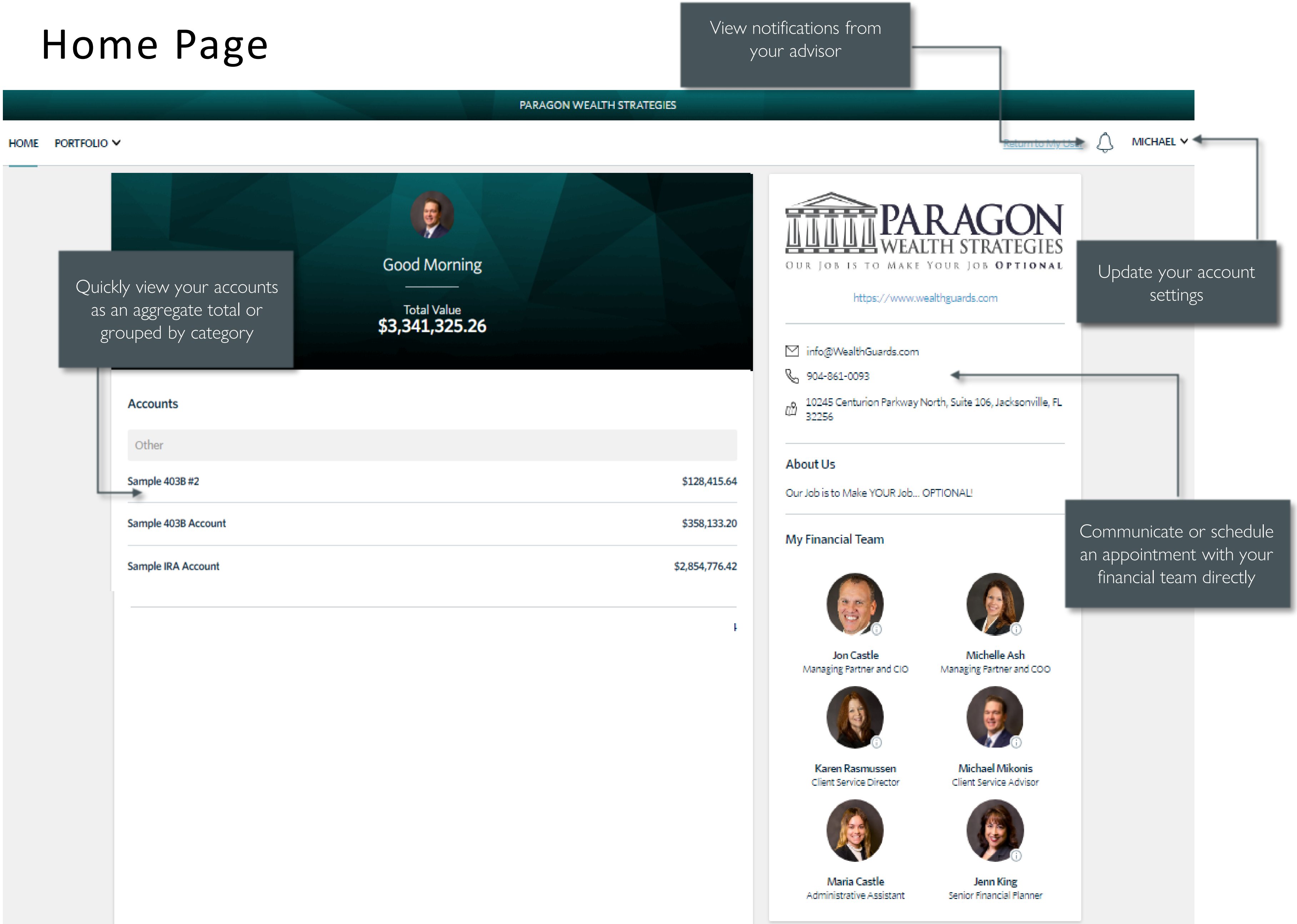
Your accounts and total portfolio value are listed front and center. Next to your accounts, you'll also find your top holdings for quick reference.

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.



Home Page

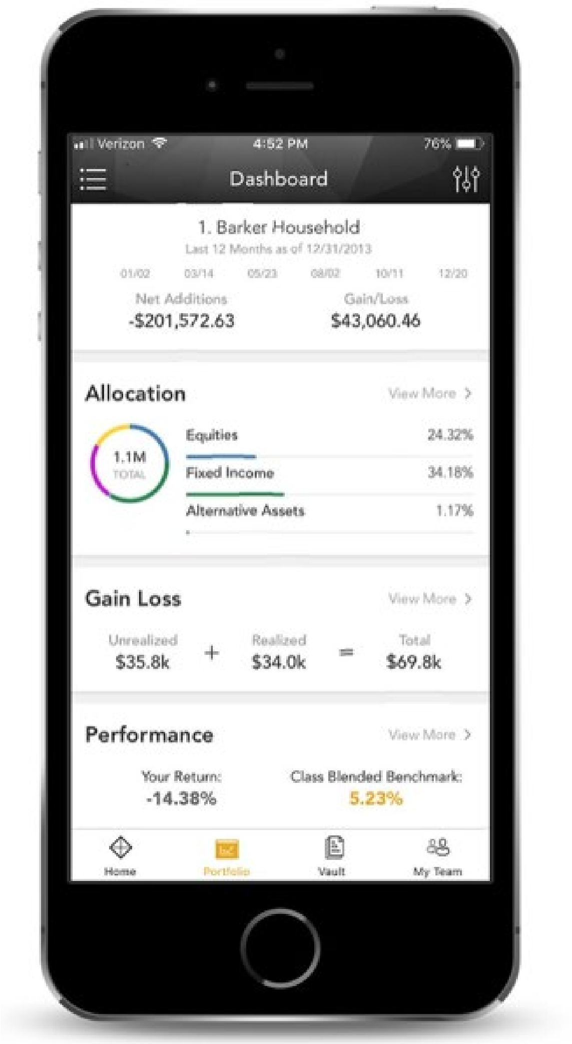

View notifications from your advisor
PARAGON WEALTH STRATEGIES
HOME
PORTFOLIO
MICHAEL
Good Morning
Total Value
$3,341,325.26
Quickly view your accounts as an aggregate total or grouped by category
Accounts
Other
Sample 403B #2 $128,415.64
Sample 403B Account $358,133.20
Sample IRA Account $2,854,776.42
PARAGON
WEALTH STRATEGIES
OUR JOB IS TO MAKE YOUR JOB OPTIONAL
https://www.wealthguards.com
info@WealthGuards.com
904-861-0093
10245 Centurion Parkway North, Suite 106, Jacksonville, FL 32256
About Us
Our Job is to Make YOUR Job... OPTIONAL!
My Financial Team
Jon Castle
Managing Partner and CIO
Michelle Ash
Managing Partner and COO
Karen Rasmussen
Client Service Director
Michael Mikonis
Client Service Advisor
Maria Castle
Administrative Assistant
Jenn King
Senior Financial Planner
Update your account settings
Communicate or schedule an appointment with your financial team directly

Portfolio

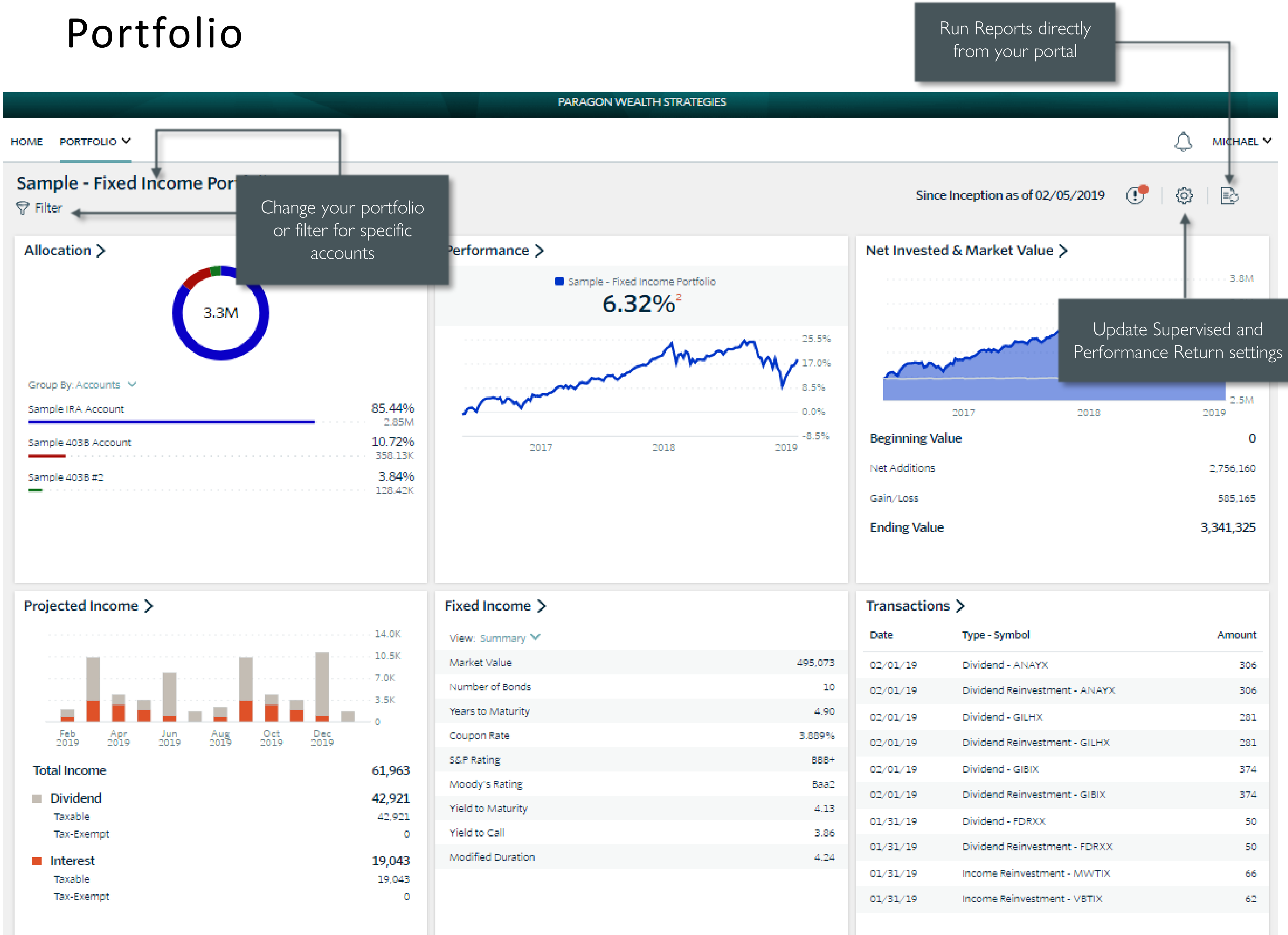
The Portfolio dashboard is where you can view additional details about your portfolio. The dashboard gives you a dynamic overview of your portfolio with performance cards highlighting key information of your portfolio.

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.



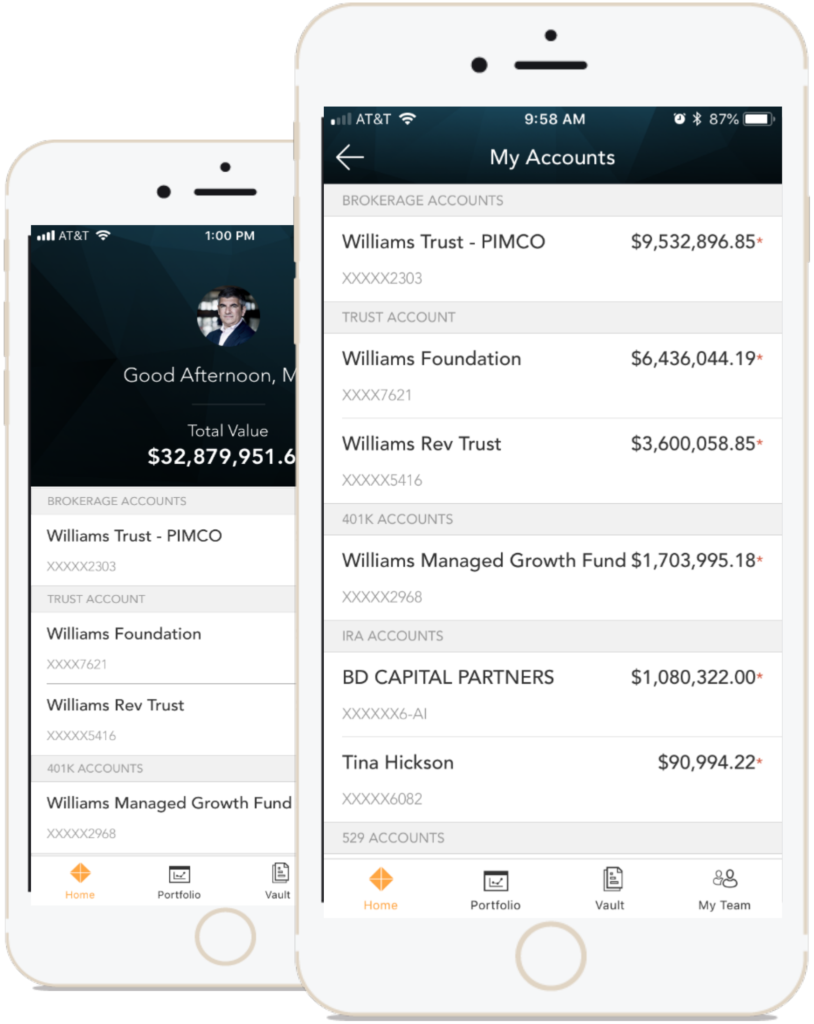
Portfolio


Run Reports directly from your portal
PARAGON WEALTH STRATEGIES
HOME
PORTFOLIO
MICHAEL
Sample - Fixed Income Por
Filter
Change your portfolio or filter for specific accounts
Since Inception as of 02/05/2019
Update Supervised and Performance Return settings
Allocation
3.3M
Group By: Accounts
Sample IRA Account 85.44% 2.85M
Sample 403B Account 10.72% 358.13K
Sample 403B #2 3.84% 128.42K
Performance
Sample - Fixed Income Portfolio
6.32%
Net Invested & Market Value
Beginning Value 0
Net Additions 2,756,160
Gain/Loss 585,165
Ending Value 3,341,325
Projected Income
Total Income 61,963
Dividend 42,921
Taxable 42,921
Tax-Exempt 0
Interest 19,043
Taxable 19,043
Tax-Exempt 0
Fixed Income
View: Summary
Market Value 495,073
Number of Bonds 10
Years to Maturity 4.90
Coupon Rate 3.889%
S&P Rating BBB+
Moody's Rating Baa2
Yield to Maturity 4.13
Yield to Call 3.86
Modified Duration 4.24
Transactions
Date Type - Symbol Amount
02/01/19 Dividend - ANAYX 306
02/01/19 Dividend Reinvestment - ANAYX 306
02/01/19 Dividend - GILHX 281
02/01/19 Dividend Reinvestment - GILHX 281
02/01/19 Dividend - GIBIX 374
02/01/19 Dividend Reinvestment - GIBIX 374
01/31/19 Dividend - FDRXX 50
01/31/19 Dividend Reinvestment - FDRXX 50
01/31/19 Income Reinvestment - MWTIX 66
01/31/19 Income Reinvestment - VBTIX 62

My Accounts

On the My Accounts page, you can see a detailed list of your accounts. Balances and statuses are viewable at a glance. You can expand each account to see your holdings and their individual values.

Keep track of their status and updates directly from your portal.



Performance Card

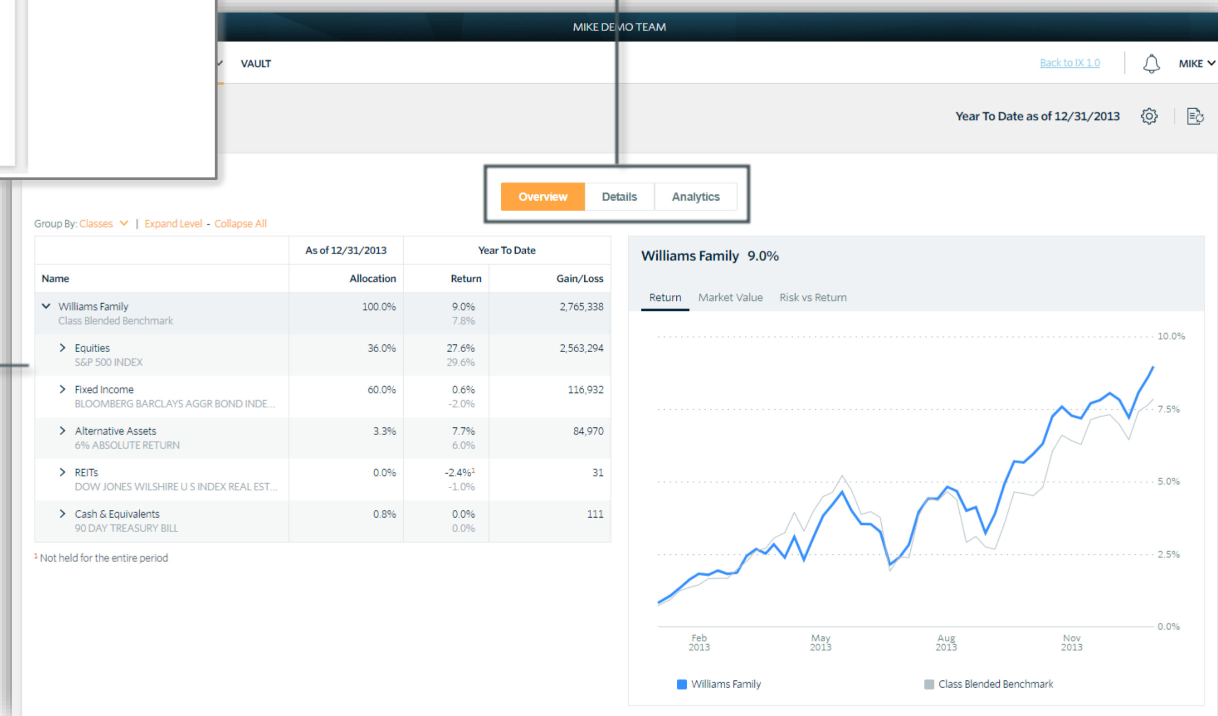
View investment performance across your portfolio

(Consolidated View)

Hover to view returns through a specific date

Change your view to see multiple date ranges or market analytics

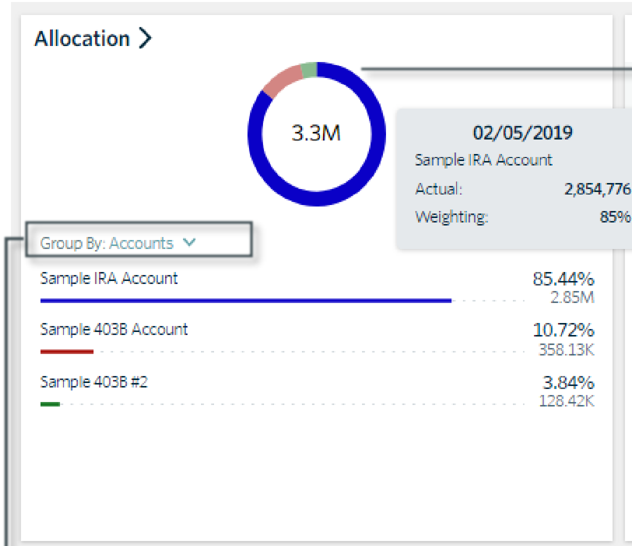
Expand and collapse the grouped sections



(Expanded View)

Allocation

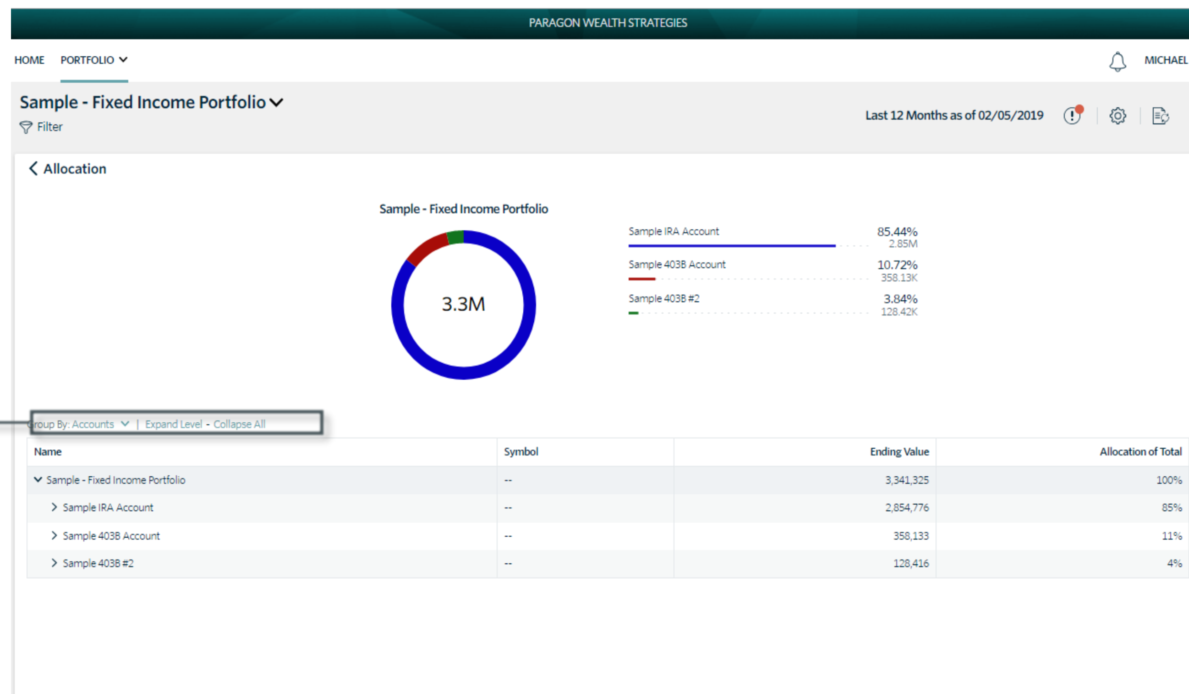
View the allocation breakdown of your portfolio



Hover to view grouping level allocation detail

(Consolidated View)

Change the data grouping from the dashboard or the expanded card



(Expanded View)

Net Invested & Market Value

View activity and changes in your portfolio or account balance

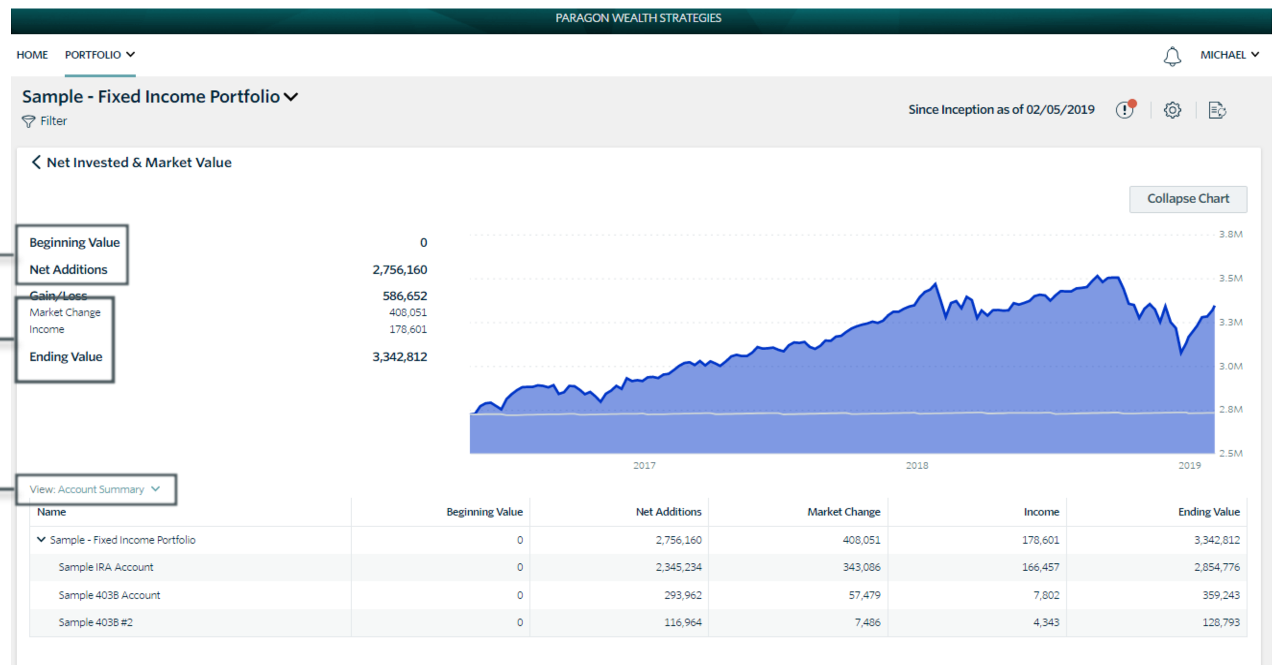
(Consolidated View)

Hover over graph to view net addition and market value information for a specific date

View breakout of additions and withdrawals

See income and performance breakouts

Toggle to view either summary detail or transactions



(Expanded View)

Transactions

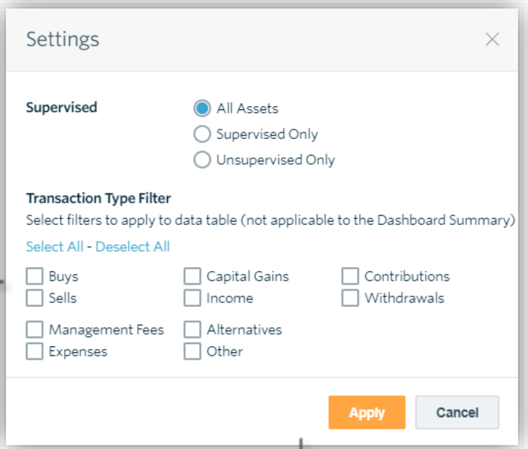
View and filter the most recent transactions in your portfolio

Transactions >

Date	Type - Symbol	Amount
02/01/19	Dividend - ANAYX	306
02/01/19	Dividend Reinvestment - ANAYX	306
02/01/19	Dividend - GILHX	281
02/01/19	Dividend Reinvestment - GILHX	281
02/01/19	Dividend - GIBIX	374
02/01/19	Dividend Reinvestment - GIBIX	374
01/31/19	Dividend - FDRXX	50
01/31/19	Dividend Reinvestment - FDRXX	50
01/31/19	Income Reinvestment - MWTIX	66
01/31/19	Income Reinvestment - VBTIX	62

(Consolidated View)

Filter by transaction (available filters are determined by your advisor)



PARAGON WEALTH STRATEGIES

HOME PORTFOLIO MICHAEL

Sample - Fixed Income Portfolio

Filter

Last 12 Months as of 02/05/2019

< Transactions

Filters

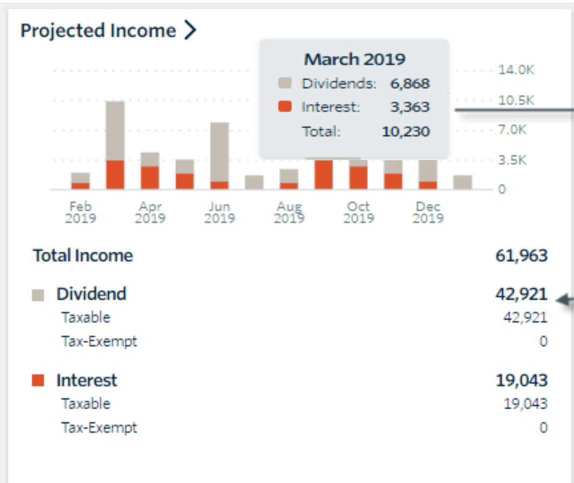
Date	Account Name	Type	Asset Name	Symbol	Units	Price	Amount
02/01/19	Sample IRA Account	Dividend	ALLIANCE BERNSTEIN GLOBAL BOND FUND ADVISOR CLASS	ANAYX	--	--	306
02/01/19	Sample IRA Account	Dividend Reinvestment	ALLIANCE BERNSTEIN GLOBAL BOND FUND ADVISOR CLASS	ANAYX	37	8	306
02/01/19	Sample IRA Account	Dividend	GUGGENHEIM LIMITED DURATION FUND INSTITUTIONAL CLASS	GILHX	--	--	281
02/01/19	Sample IRA Account	Dividend Reinvestment	GUGGENHEIM LIMITED DURATION FUND INSTITUTIONAL CLASS	GILHX	11	25	281
02/01/19	Sample IRA Account	Dividend	GUGGENHEIM TOTAL RETURN BOND FUND INSTITUTIONAL CLASS	GIBIX	--	--	374
02/01/19	Sample IRA Account	Dividend Reinvestment	GUGGENHEIM TOTAL RETURN BOND FUND	GIBIX	14	27	374

Sort column headers to quickly organize your transactions

(Expanded View)

Projected Income

Review a snapshot of expected dividend and interest payments



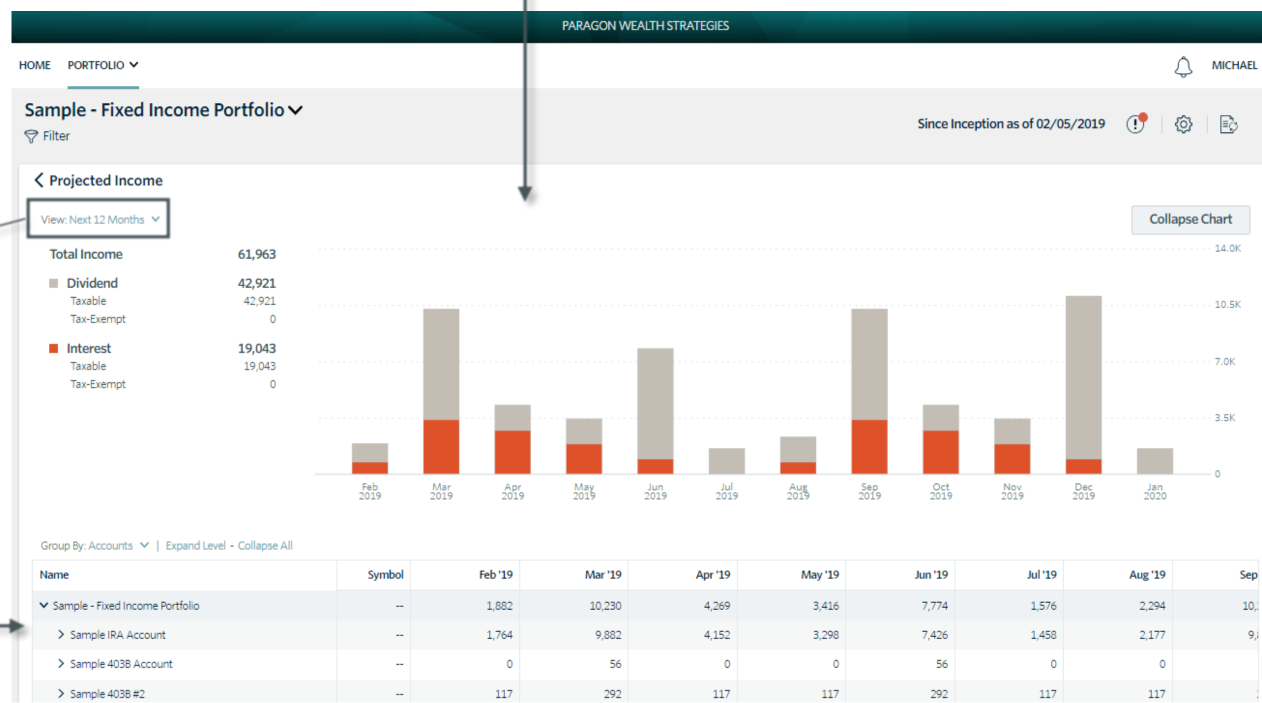
(Consolidated View)

Hover to view monthly dividend and interest detail

The card displays total projected income for the selected time period, a breakout of projected dividends and interest, plus a month-by-month bar chart

Choose between viewing projected income for 'Next 12 Months' or 'Remainder of Year'

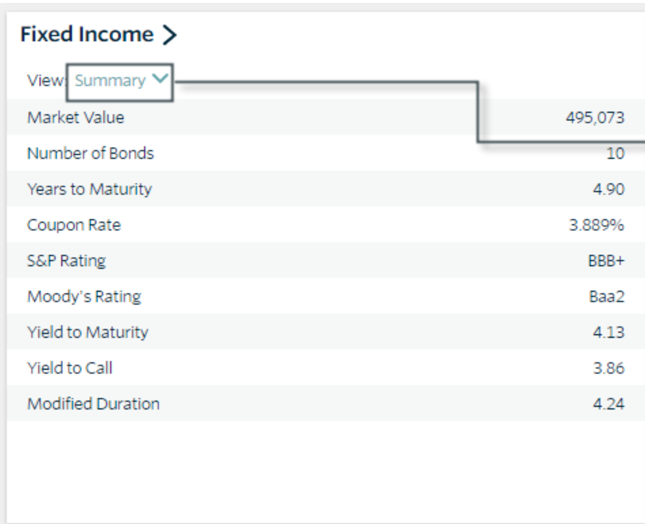
View projected income at your grouped level



(Expanded View)

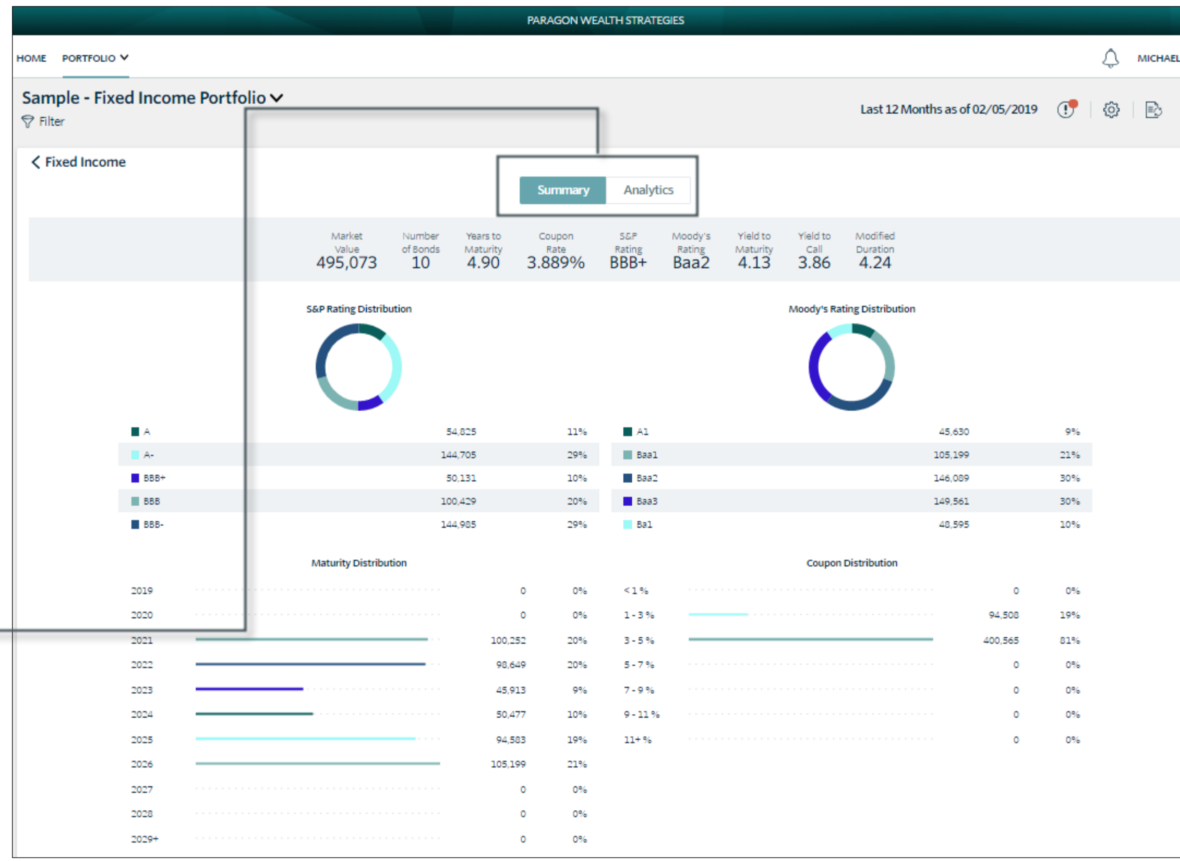
Fixed Income

Review a snapshot of fixed income holdings in your portfolio



(Consolidated View)

The card displays important statistics about your Fixed Income. Different options in the dropdown are Ratings, Maturity or Coupon Distribution graphs and pie charts of the bonds' ratings.

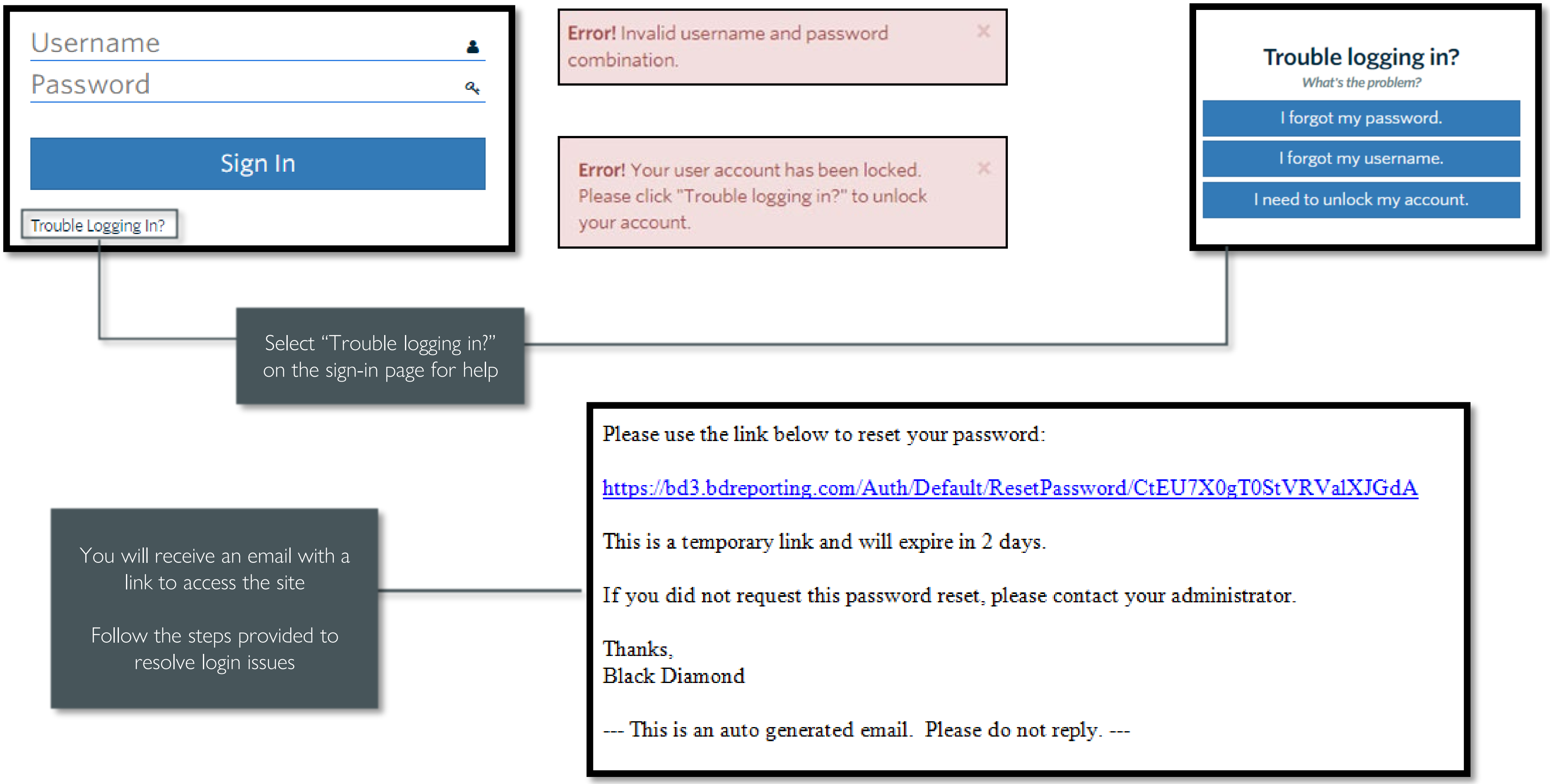


Toggle between a summary page and analytical data associated with your fixed income holdings

(Expanded View)

Login Problems

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



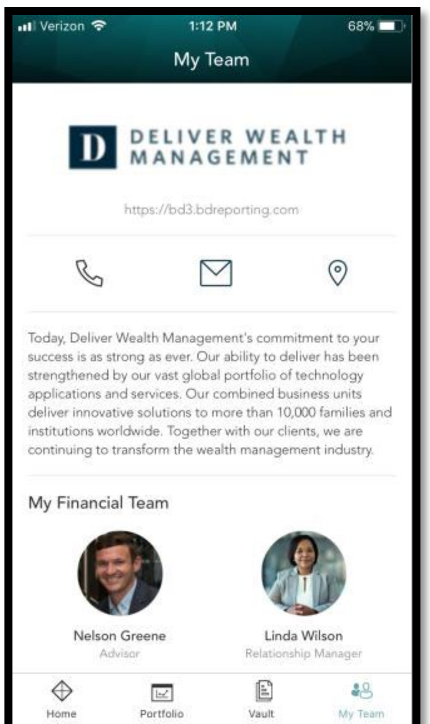
Mobile Application

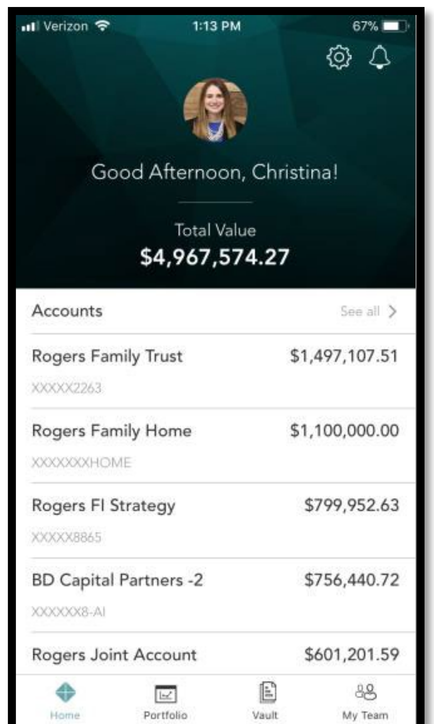
Download the Client Experience from the Apple App Store or Google Play

Please click on the below link to download the Black Diamond app for your device:

https://itunes.apple.com/us/app/black-diamond-wealth-platform/id1326892984

https://play.google.com/store/apps/details?id=com.bdmobile&hl=en





Touch Icon

Your personalized portal keeps you connected to your financial life, your advisory team, and everything else you need for managing your wealth.

PARAGON
WEALTH STRATEGIES
OUR JOB IS TO MAKE YOUR JOB OPTIONAL

PARAGON
WEALTH STRATEGIES

OUR JOB IS TO MAKE YOUR JOB **OPTIONAL**

If you have any questions, please contact us.

Phone: 904.861.0093

For Login Help: chris.anderson@wealthguards.com
For Account Questions: Michael.Mikonis@wealthguards.com