



yourCFO
ADVISORY
GROUP INC

yourCFO On-Line Portfolio Access

As an added value, your *yourCFO* Financial Advisor provides you on-line Portfolio Access. You can view the holdings in your accounts, all past transactions, reports and much more. The site is updated daily.

Please contact your Financial Advisor to gain access. They will set you up with a Username and Password, and send you instructions on how to use the various features of the site.

Disclaimer to joint account holders *(to be completed, signed by all related parties, and returned to your Financial Advisor prior to obtaining your access information):*

I understand and accept that using *yourCFO* Advisory Group Inc.'s online account viewing service may allow joint account holders to view personal information that pertains to any account I may hold, not only those held with said joint account holders.

client name

client signature

date

client name

client signature

date