

Online Account Access

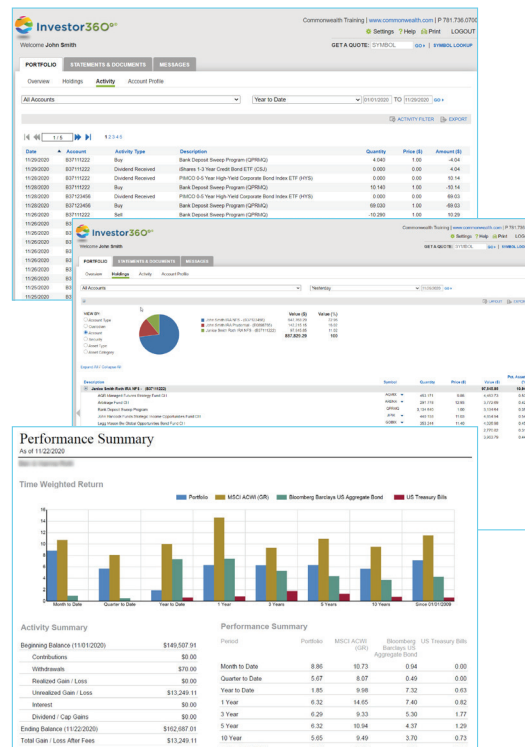
Our advanced client website, Investor360[®], illustrates account information, such as account balances, positions, and activity, as well as provides secure access to documents and statements, whenever you want it—24 hours a day, 7 days a week, 365 days a year.

Because Investor360[®] is web-based, you can access your account information at your office, at home, or anywhere you can connect to the internet. Investor360[®] works with today's most popular internet browsers, including Microsoft Edge, Firefox, Safari (for Macintosh), and Chrome.

Also, our mobile app makes it easy for you to view your account information on the go. You can download the app directly from the App Store (for Apple devices) or Google Play (for Android devices). Just search for "Investor360" and follow the prompts to add the app to your smartphone or tablet.

Here are some of the features you may find most useful:

- **Overview** displays your accounts and their current values, as well as a summary of activity, asset allocation, and a historical chart of balances.
- **Holdings** shows all your holdings at various levels (e.g., by asset and by asset category), with the option to group them by account or by securities held across all accounts. You can also export data directly to Excel.
- **Activity** details all your account activity, such as buys and sells, dividends, and adjustments, and allows you to view realized gain/loss information. Smart filters make it easy to drill down into an activity to find what you are looking for.
- **Statements and confirms** are available electronically, and you can save yourself from extra paperwork (and help the environment) by signing up for e-delivery of these items.



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Williams Asset Management
 8850 Columbia 100 Parkway, Suite 204
 Columbia, MD 21045
 410.740.0220 | www.williamsassetmanagement.com