



BASE

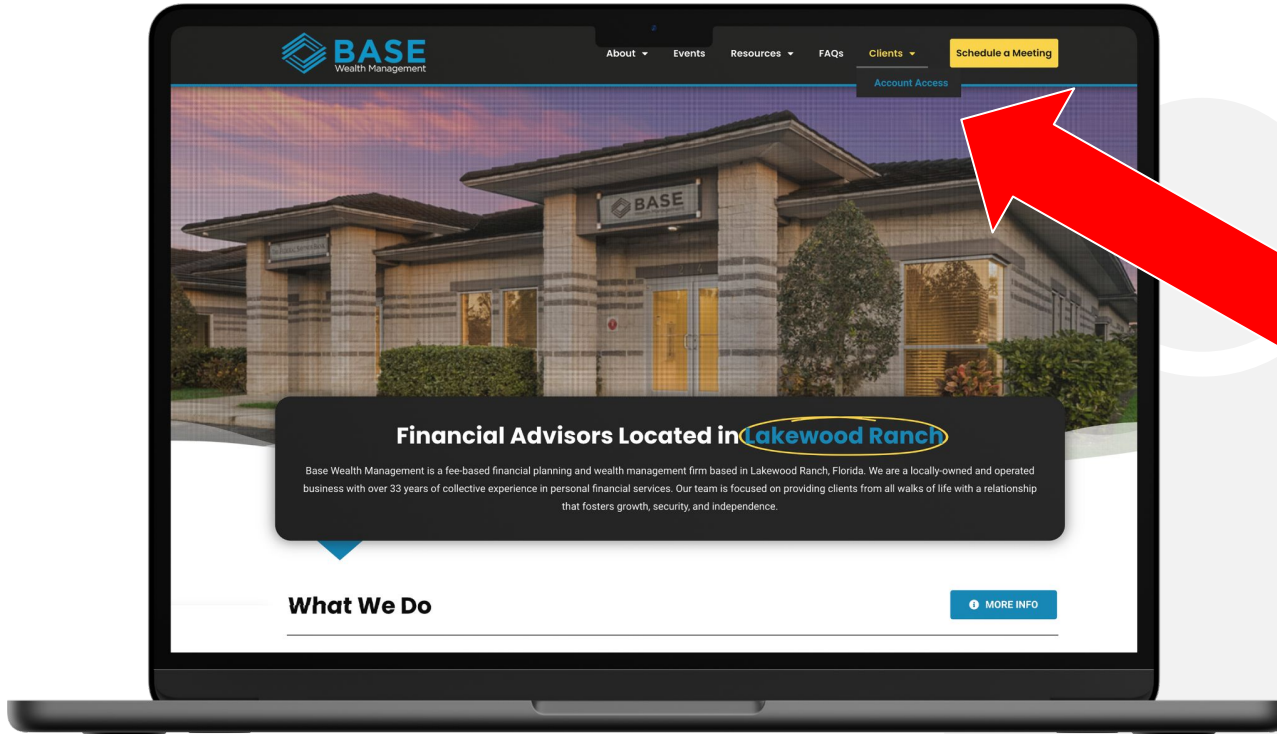
Wealth Management

CLIENT PORTAL ACCESS

THE NEW EXPERIENCE WITH ADVYZON

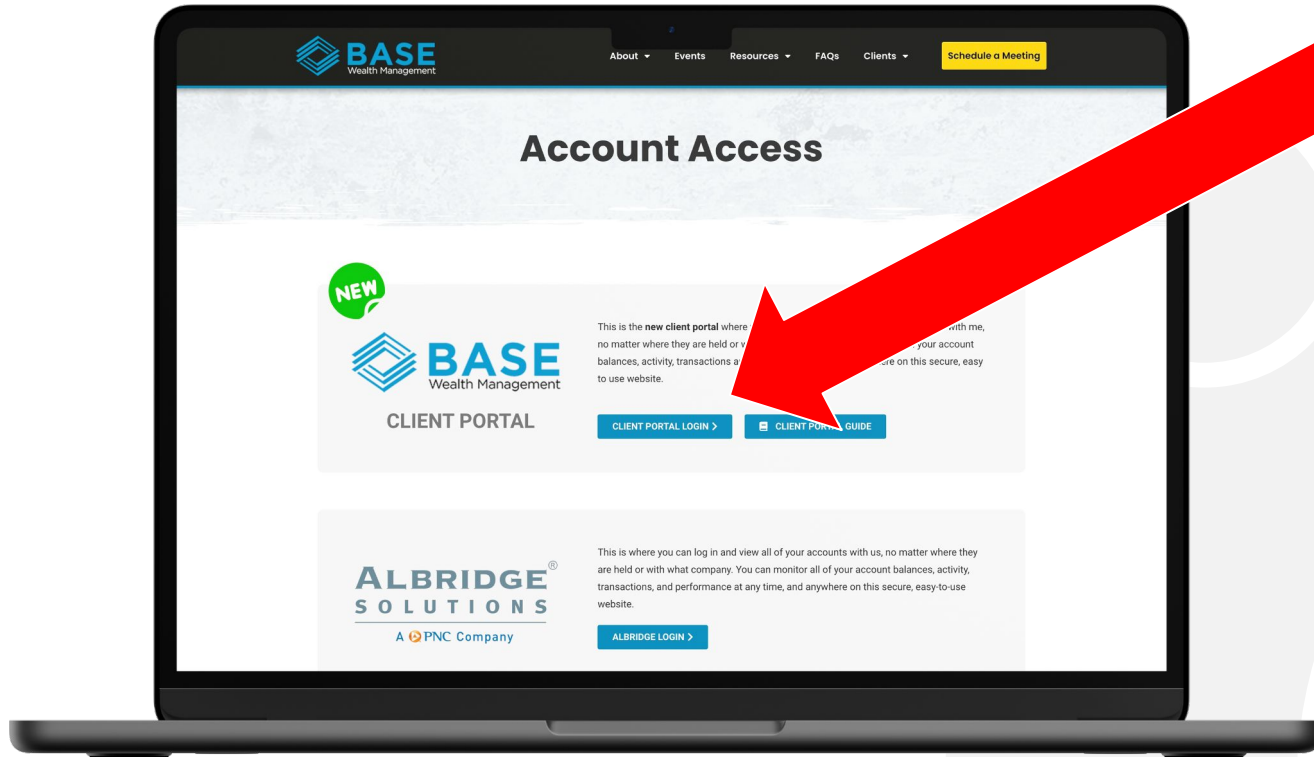
1

Visit www.BaseWealthManagement.com, hover over **CLIENTS** and click **ACCOUNT ACCESS**.



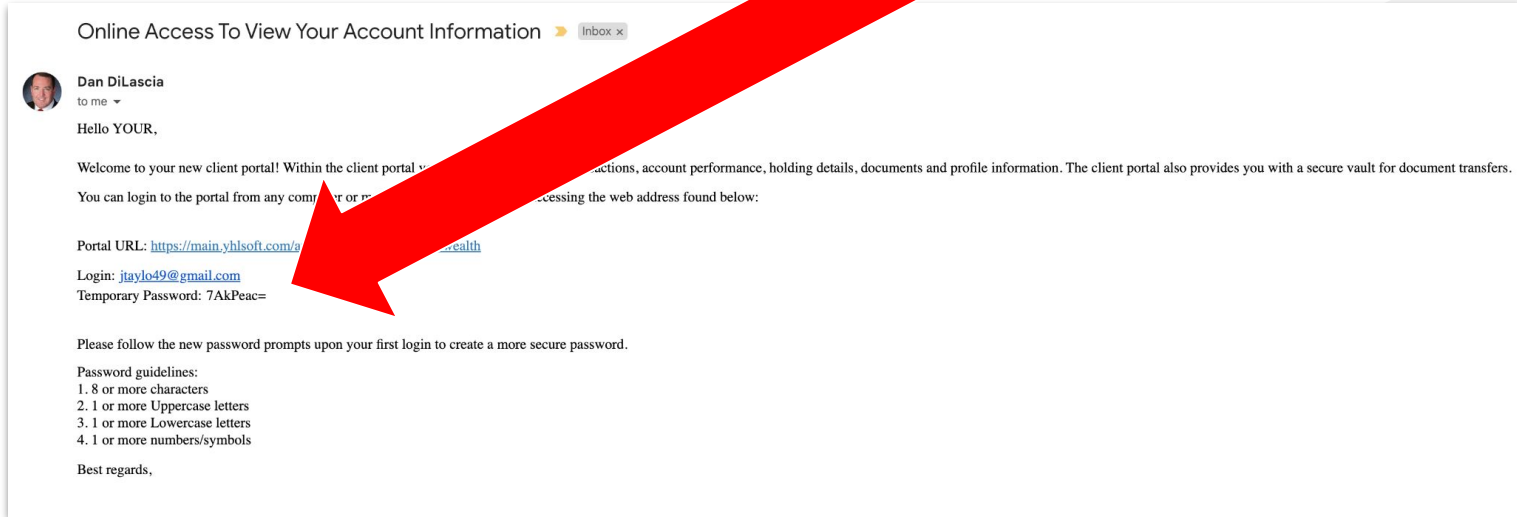
2

Click the new **CLIENT PORTAL LOGIN** button.



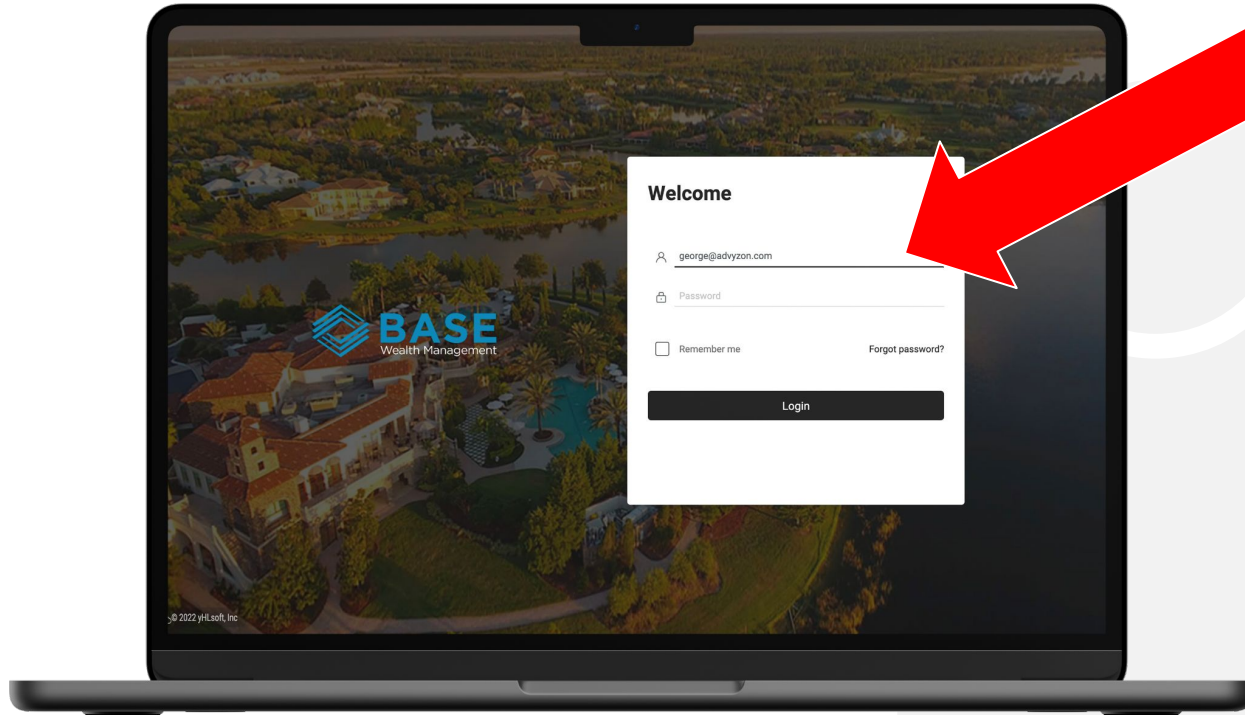
3

Find the login details from an email in your inbox.



4

Use the login details to log in for the first time.



5

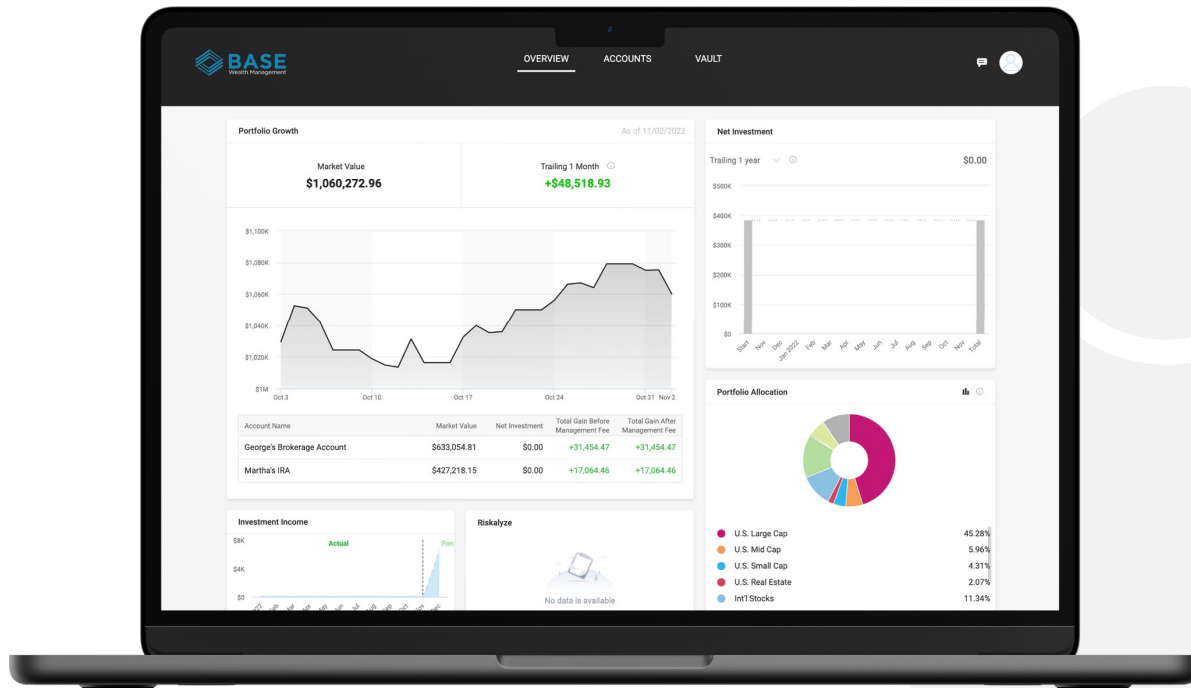
When logging in for the first time, you will be prompted to change your password to one with the following criteria:

1. 8 or more characters
2. 1 or more Uppercase letters
3. 1 or more Lowercase letters
4. 1 or more numbers/symbols



6

After successfully logging in, you will see an overview of your accounts.



7

If your portal also includes accounts for other people (such as your spouse), click the profile image to switch between each person.

The image shows a laptop displaying the BASE Wealth Management portal. The interface includes a navigation bar with 'OVERVIEW', 'ACCOUNTS', and 'VAULT'. The main content area features several sections: 'Portfolio Growth' with a line chart showing market value over time, 'Net Investment' with a bar chart showing investment over a trailing year, 'Portfolio Allocation' with a donut chart showing asset distribution, and a table of account details.

Account Name	Market Value	Net Investment	Total Gain Before Management Fee	Total Gain After Management Fee
George's Brokerage Account	\$633,054.81	\$0.00	+\$31,454.47	+\$31,454.47
Martha's IRA	\$427,218.15	\$0.00	+\$17,064.46	+\$17,064.46

A user profile dropdown menu is open, showing options for 'Profile', 'Security', and 'Contact us'. It also lists 'Linked Access(2)' with 'YOUR NAME' and 'YOUR SPOUSE'S NAME'. A green arrow points from the profile image in the dropdown to a larger, detailed view of the profile page on the right. A red arrow points from the bottom right of the laptop screen towards the profile page.

The profile page on the right shows a greeting 'Good morning, YOUR NAME' and a list of options: 'Profile', 'Security', 'Contact us', 'Linked Access(2)', 'YOUR NAME', 'YOUR SPOUSE'S NAME', and 'Logout'.



Disclosures

Base Wealth Management (“BWM”) is a Registered Investment Adviser with the U.S. Securities and Exchange Commission.

Thank you for being part of the Base Wealth Management family of clients. We appreciate your business and support. Remember that we are never too busy to help someone you care about.

