

Website Account Access: Billing Statements via Client Portal

You can now log in to the *StrategicPoint Client Portal* to access your quarterly statement. Here is a brief explanation of how to find it.

To access your account:

- visit www.StrategicPoint.com
- click on Client Login & choose the Portal tab
- click Login and use your login credentials
- select the folder icon to your left, this is where you can find your quarterly statement of management fees

The screenshot displays the StrategicPoint Investment Advisors client portal. On the left, a sidebar contains navigation icons: a building, a document, and a folder (highlighted with a red circle). The main content area is titled 'ACCOUNTS' and features a table of managed accounts. The table lists account types, names, and balances. The 'Managed' account type is selected, showing a total balance of \$1,027,491. Below this, a list of specific accounts is shown, including 'Athene Fixed Annuity for Joseph Sampl...', 'Joint Account for Joseph and ...', 'Mary Sample Revocable Trust-...', and 'Traditional IRA for Joseph Sam...'. Each account entry includes a unique identifier (XXXXX) and a balance. The right sidebar shows the 'Managed Accounts' section, which is last updated on 09/04/2025 at 3:51 PM. It includes tabs for 'Summary', 'Allocation', and 'Performance'. The 'Summary' tab is active, displaying the 'MARKET VALUE AS OF 9/3/2025' and an 'Activity Summary' section with 'Beginning Market Value', 'Change In Accrued Income', 'Market Value Change', and 'Ending Market Value'. The 'Asset Category Allocation' section is also visible at the bottom.

ACCOUNTS	
Investment	\$1,027,491
Managed	\$1,027,491
x Closed Account x	\$1,027,491
Athene Fixed Annuity for Joseph Sampl... XXXXX3344	\$41,819
Joint Account for Joseph and ... XXXXXX4444	\$558,854
Mary Sample Revocable Trust-... XXXXXX2222	\$86,386
Traditional IRA for Joseph Sam... XXXXXX5555	\$340,431