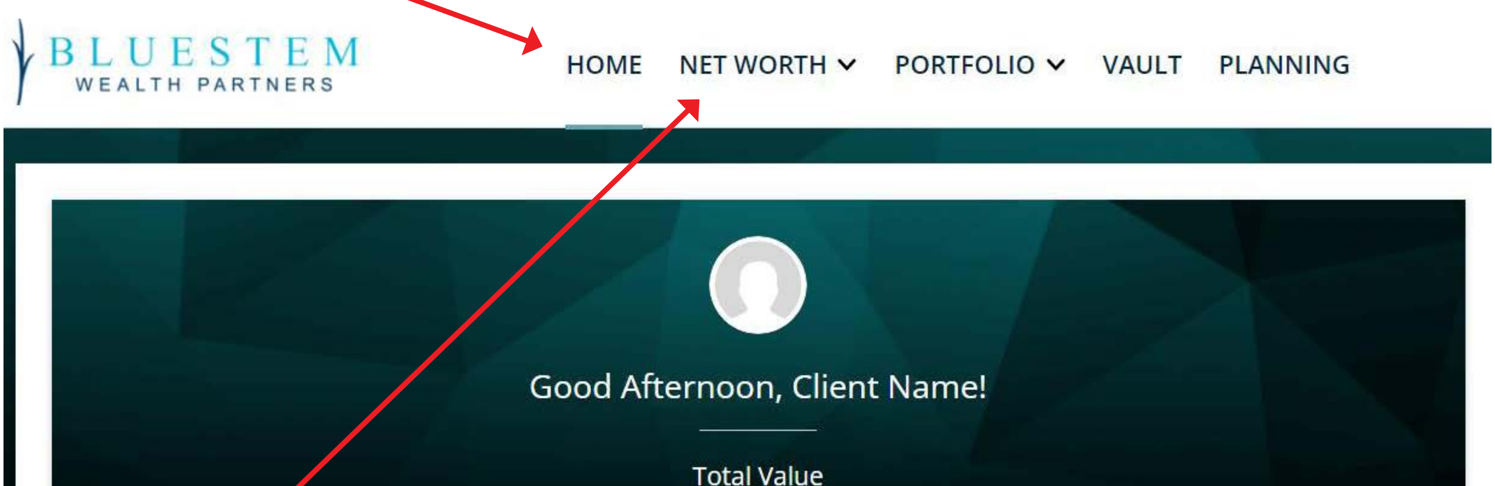
ByAllAccounts Feature and Multifactor Authentication

The BlueStem Wealth Partners Client portal is the best way for you to view the accounts we manage on your behalf. It is also a great resource to leverage if you want to link or create a manual entry to aggregate financial assets that are held at other institutions, i.e., a checking account, your mortgage, etc.

Based on client feedback, we are making a small change to how you view your accounts at BlueStem Wealth Partners and where you find your aggregated view that includes your outside accounts that you have linked and/or entered manually on the portal. This change only impacts clients that have added outside accounts to the BlueStem portal. This change will result in less scrolling, along with a clearer picture of your assets managed by BlueStem Wealth Partners and those assets held at other institutions.

<u>HOME</u> <u>Tab</u> - starting next week, the **HOME** tab will only show accounts managed by BlueStem Wealth Partners.



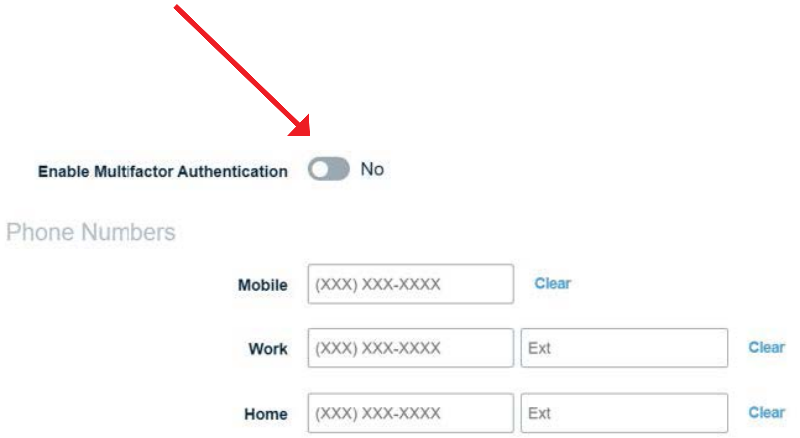
<u>NET WORTH</u> <u>Tab</u> – the **NET WORTH** tab is where you can view all your accounts, including those managed by BlueStem and any outside accounts you may have linked or manually added, including accounts held at Ameriprise.

ByAllAccounts Feature – This is the way that you add manual or synced assets for viewing on the BlueStem portal, i.e. car loans, bank accounts, home value, etc. It can be accessed by clicking on the Add Account button once you enter the Net Worth tab. If syncing accounts, you will need to have your login credentials for the institution you are adding.

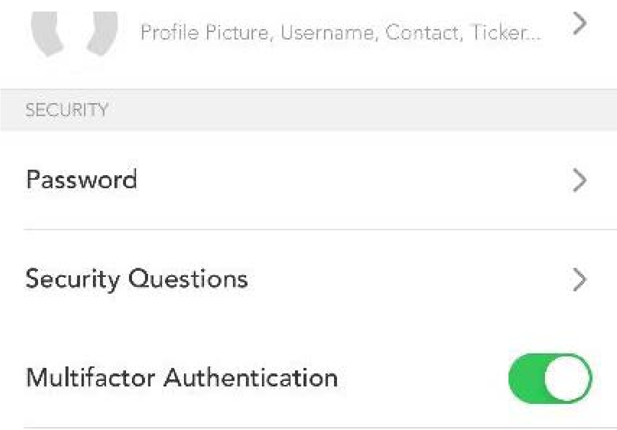
Multifactor Authorization – We believe strongly in the security of the BlueStem portal. For those of you that would like to add multifactor authorization to your account (security question, email, or text) we wanted to outline the steps you can follow to establish it on your accounts.

Desktop (preferred method) – You can access the BlueStem portal directly from our website at BlueStem Wealth Partners | Financial Life Planning and Investment Management.

Once you have logged in, click on your name in the upper right and choose My Preferences. From there you can activate the Multifactor Authentication radio button. You can then add your mobile phone number, and confirm your email, passwords, and security questions.



Mobile Device – Once you have logged into the BlueStem portal via the Black Diamond application, go to Settings and then activate the Multifactor Authentication radio button.



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We meet you where you are with technology that reaches across the globe.