M Financial Group™
Member Firm

A privately held consortium founded in 1978 and based in Portland, OR.

Composed of:

- M Holdings Securities, Inc.
- M Financial RE
- M Benefits Group

Owned by over 140 Member Firms located primarily in the USA.

Resources are leveraged for your benefit by and through MAP.

For more information on M Financial, visit www.mfin.com

M Holdings Securities, Inc.™

A SEC and FINRA Registered Broker/Dealer and Registered Investment Advisery Firm.

Exclusive to M Member Firms, M Holdings Securities (MHS) ranks among the largest independent Broker/Dealers in the nation and holds your MAP financial advisor's securities licenses.

Resources are leveraged for your benefit by and through MAP.

For more information, visit www.mfin.com

PRISM DocuSign

M Financial has a state-of-the-art proprietary, electronic systems architecture called Prism to help you interact digitally with financial solution providers and MAP advisors. Enjoy the ease and simplicity of viewing new business and account servicing documents and securely sign them electronically via DocuSign™.

Resources are leveraged for your benefit by and through MAP.

You'll receive a secure invite to review and sign documents, when appropriate, and can download and save electronic copies of your documents on any of your devices.

Corestone

A flexible, asset management account designed to simplify your life by allowing you to handle all your daily financial activities—checking, investing, bill pay, and more—all in one place.

Consult your MAP financial advisor to select the account structure you prefer.

When opening your first account with MAP, or anytime thereafter, you can request to have a Corestone Account™ established and personalized.

Thereafter, you can gain access through your NetXInvestor® portal online at www.msecurities.netxinvestor.com

ALBRIDGE™
AN AFFILIATE OF PERSHING

Available 24/7, this robust reporting platform gives MAP clients access to a quick account overview dashboard that drills down to various levels of specificity over a myriad of time frames.

Once you fund your first account with MAP, you'll have access to Albridge. MAP releases a time-sensitive invitation for your initial login.

Note: you can not copy and paste a temporary password, but rather have to type in the case-sensitive temporary password and then follow instructions to personalize.

Thereafter, gain access at www3.mainaccount.com/msecurities/

Pershing®

Pershing LLC is the industry's leading provider of trade clearing, settlement, and custody solutions. M Holdings Securities (MHS) utilizes Pershing for these services and you'll see both organizations on your statements, trade confirmations, and 1099/1099R tax documents. Through Pershing, your account(s) have unlimited excess SIPC insurance[1] to protect against fraud and/or failure of MHS. When funding your accounts, your checks/wire transfers are directed to Pershing LLC. To view your statements and tax documents online, Pershing allows you to do so through NetXInvestor®. Should you wish to establish a cash management account (CMA) with options like electronic bill pay and a debit card, MAP can establish a Corestone Account™.

To add money to your MAP/MHS account you can:
1. Make a **CHECK** payable to Pershing LLC with your account number in the memo section and send overnight via FedEx or UPS to: Pershing LLC, Attn: Money Desk, 300 Colonial Center Pkwy, Suite 400, Lake Mary, FL 32746 PH: (321) 249-4150, or
2. **WIRE** funds to your account at Pershing, and your bank will send to the following destination:
Bank: The Bank of New York
ABA Number: 021000018
Beneficiary: Pershing LLC
Beneficiary Account Number: 890-051238-5
Ultimate Beneficiary: (Title of account funded)
Account Number: (Your Account)

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For more information on Pershing LLC, visit www.pershing.com

NETXINVESTOR®

Whether you would like online access to view your statements and tax documents, or you'd prefer to go a step further and only get your statements and tax documents online, MAP can help you do so through Pershing's NetXInvestor®. When opening your first account with MAP or anytime thereafter you can request to be set up for access to NetXInvestor®.

Once your access is established, visit www.msecurities.netxinvestor.com

MAP — MY ADVISOR & PLANNER
helping assure lifestyle & legacy

MAP's private-label of Citrix's ShareFile program, this secure, electronic folder allows for convenient and efficient sharing of digital documents with you and your other advisors (i.e., CPA or estate planning attorney). Your MAP Vault will likely be established before you open your first account with MAP. MAP releases a time-sensitive invitation for initial login. Note: you can not copy and paste a temporary login, but rather have to type in the case-sensitive temporary password and then follow instructions to personalize. **Thereafter, enter via www.mapyourfuture.sharefile.com.**

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helping assure lifestyle & legacy

My Advisor & Planner (MAP) is an independently owned and operated private wealth management firm based in Geneva, IL. It is also an M Financial Group Member Firm. Our main office is located at 65 N. River Lane, Suite 212, Geneva, IL 60134.

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