

# REPORTING

EXPERIENCE

## Transparency and clarity.

### Reviews and Reports

#### Quarterly in-person reviews that include:

- Progress to plan
- Detailed portfolio performance across asset classes
- Market overview, including deep dives on current themes

#### Customized in-depth reviews for the services you receive:

- Planning
- Legal
- Tax
- Lifestyle

#### Other reporting services include:

- Net worth statement
- Year-end tax reporting
- Customized reporting capabilities

### Portal Access

#### Online access that gives you transparency via the following tools and dashboards:

- Independent 3rd party reporting, including account aggregation
- True Fiduciary® Portal, financial goal tracking
- True Fiduciary® Vault, online document storage

### Market Overview

#### We dig deep so you don't have to:

- Insights on what PagnatoKarp is watching
- Market commentary
- Benchmark trends
- News and highlights through Barron's

## Disclosures

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