

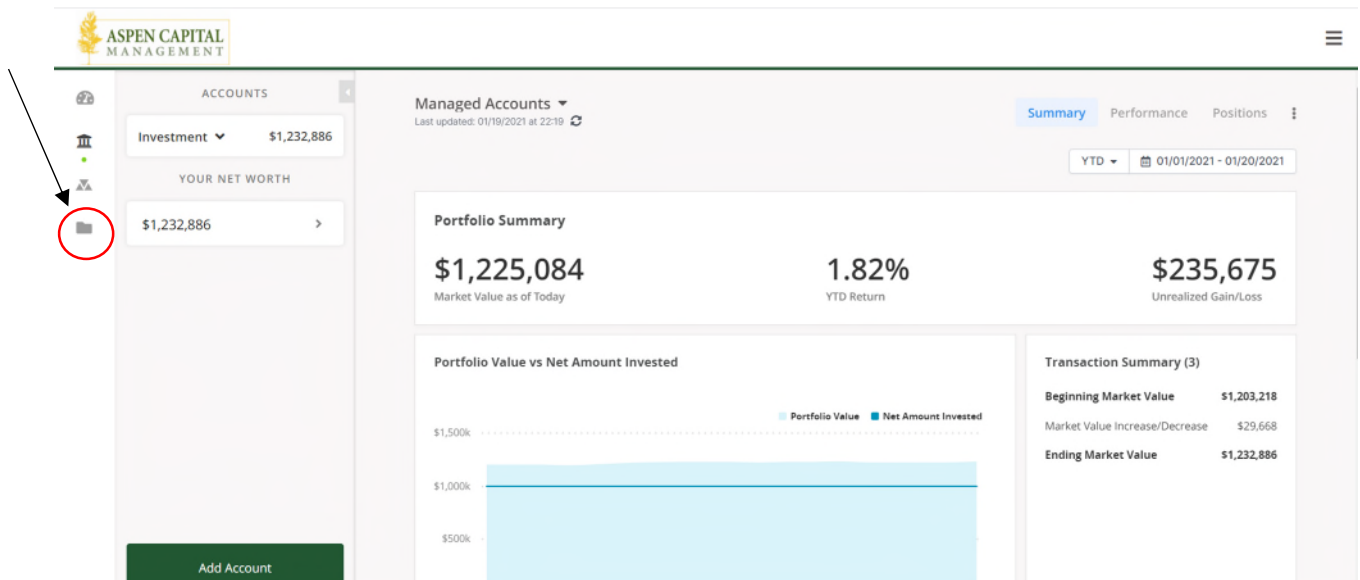
How to Access Quarterly Statements and Year-End Tax Reports in the Client Portal

1. Log into the client portal with your username and password



The login form for Aspen Capital Management features the company logo at the top, which includes a stylized tree and the text "ASPEN CAPITAL MANAGEMENT". Below the logo are two input fields: the first contains the email address "demo@aspencap.com" and the second contains a masked password "*****". A checkbox labeled "Remember My Device" is checked. A prominent green "Sign In" button is centered below the inputs, with a "Forgot password?" link underneath.

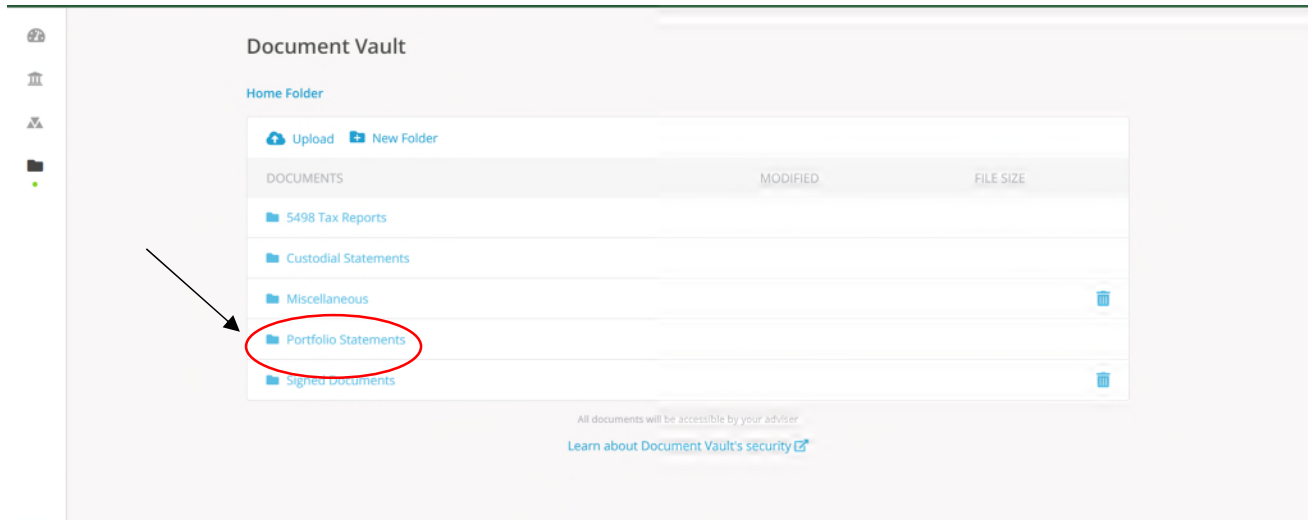
2. From the portal homepage, click on the folder icon on the left side of the screen to access your document vault:



The screenshot shows the client portal homepage. On the left sidebar, a folder icon is circled in red and pointed to by an arrow, indicating the location to click to access the document vault. The main content area displays a "Managed Accounts" section with a dropdown menu and a refresh icon. Below this, a "Portfolio Summary" card shows a market value of \$1,225,084, a 1.82% YTD return, and an unrealized gain/loss of \$235,675. A "Portfolio Value vs Net Amount Invested" chart is visible, along with a "Transaction Summary (3)" table.

Transaction	Value
Beginning Market Value	\$1,203,218
Market Value Increase/Decrease	\$29,668
Ending Market Value	\$1,232,886

3. Within the document vault, your quarterly reports and year-end tax reports are located in the “Portfolio Statements” folder



4. Please note that you also have access to TD Ameritrade month-end statements for each of your TD Ameritrade accounts in the “Custodial Statements” folder, and access to TD Ameritrade tax forms in the “Tax Reports” folders for each specific type of report (in the image above, “5498 Tax Reports”).