



CURTIS
FINANCIAL GROUP

TAKE CONTROL OF YOUR PERSONAL ECONOMIC OUTLOOK

Introducing the interactive wealth management tool...

CFG FORESIGHT

1. ORGANIZER

Connect all your accounts and information for an organized, consolidated view.

2. FINANCIAL WORKSHOP

See if you're on target to reach your most important financial goals.

3. EDUCATION CENTER

Your own library of videos, articles and resources to increase your financial knowledge.

4. VAULT

Safely store your most important documents for quick and easy access.

5. UPDATED NET WORTH

Your net worth is calculated and updated daily.

6. INVESTMENTS

Interactive charts and detailed views provide you with increased visibility into your accounts.

7. SPEND TRACKING

Know how much you're spending and where.

8. BUDGETING TOOLS

Set budgets to help you reach your savings goals.

9. GUIDED TOUR

Get an overview of how to maximize the benefits of your personal financial website.



Justin Curtis, Registered Representative offering securities through NYLIFE Securities LLC, Member FINRA/SIPC, a Licensed Insurance Agency. Tel: 615 224 9500

*Financial adviser offering investment advisory services through Eagle Strategies L.L.C., a Registered Investment Adviser. Curtis Financial Group is not owned or operated by NYLIFE Securities, LLC or its affiliates.



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SAFE & SECURE

Our Wealth Management Tool employs the most advanced security features and protocols to keep your data safe, private and secure, 24/7/365. Comprehensive security protection measures include password protection, secure socket layer encryption, firewalls, intrusion detection, audits, inspections and more. You can be confident that your important information is safe and secure.



NON TRANSACTIONAL

- ✓ Unlike online banking, trading or shopping websites, your money cannot be moved, withdrawn or accessed on our system.

PASSWORD PROTECTION

- ✓ You have a unique User ID and Password. If three consecutive login attempts fail, the system automatically locks your account for 10 minutes, blocking any manual or programmed hacking attempts.
- ✓ Your User ID and Password will never be given out over the phone or sent to an email address that is not pre-registered with your account.

HIGHEST ENCRYPTION

- ✓ Our system uses a 256-bit Secure Socket Layer to scramble your data to prevent access to unauthorized users. This is the highest level of encryption currently available today.
- ✓ Your data is so scrambled that trying to read it without authorization is like looking for a single grain of sand on miles of beach.

SECURED DATA

- ✓ We house your important data with SunGard Data Systems, a revolutionary server hosting space offering the most secure environment in the industry. SunGard hosts 70% of all financial industry transactions.
- ✓ Physical access at SunGard's world-class hosting server centers is limited to authorized personnel, and requires multiple levels of authentication, including fingerprint scanning. SunGard Data Systems also makes use of fire protection, electronic shielding, database backups and more to ensure your data is continuously monitored and protected.

CERTIFIED HACKER SAFE

- ✓ Our Wealth Management System uses third-party security auditors including McAfee, TraceSecurity, and WhiteHat Security to continuously try to hack into the system. Our firewalls have never been breached.
- ✓ Our Wealth Management System is Verisign certified to be hacker safe. To receive this approval, the system is updated every 15 minutes with tests for newly discovered vulnerabilities and validated fixes from hundreds of sources worldwide.

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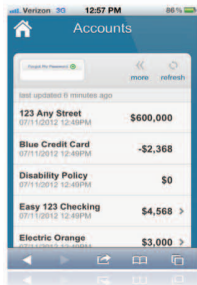


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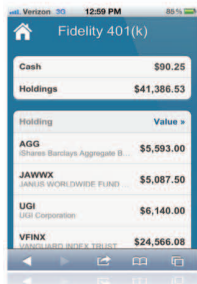
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CFG FORESIGHT

Total Smartphone Access



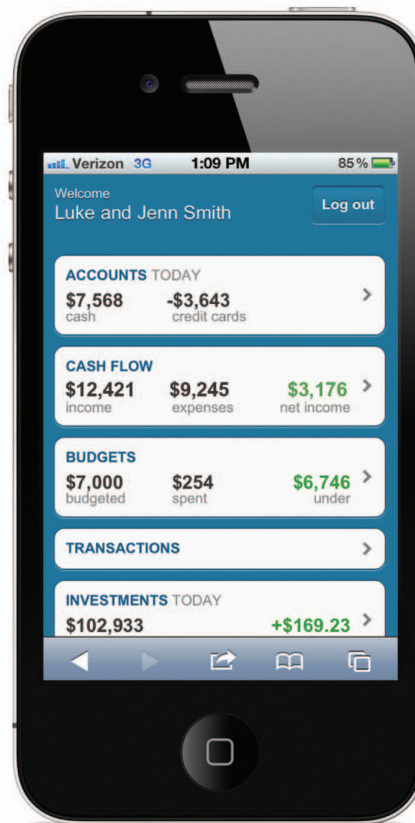
ALL YOUR
ACCOUNTS ON
ONE PAGE.



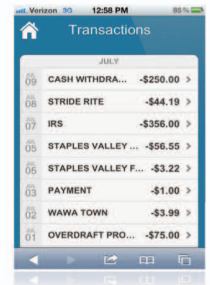
GET UPDATED
ON YOUR
INVESTMENTS.



TRACK YOUR
PROGRESS
TOWARDS
YOUR GOALS.



SEE WHAT
YOU'RE
SPENDING.



MONITOR YOUR
CASH FLOW.



ACCESS
IMPORTANT
DOCUMENTS.



Your Personal Financial Mobile Website can be accessed on the iPhone, Android, the newest Blackberry and most other popular smart phones. *Here's how to get started:*

- Access the browser on your mobile device and visit <https://wealth.emaplan.com/nylife/eagle/a11/curtisfinancialgroup>
- Before you log on, add or save the link to your Home Screen. You will want to do this first or the icon will not appear.
- Enter the same User Name and Password you use to access your Personal Financial Website.

Have questions? Give us a call or send us an email, we are here to help.

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THE VAULT

This is a checklist of important documents that can be stored in your online Vault. Many of the documents listed are examples of information that would need to be located and analyzed by family members in the event of an emergency or a premature death. These documents can be scanned and stored in the Vault, easily accessible to you and your family anywhere there is internet access.

The Vault allows you to store files of the following types: **aifc, aiff, aif, au, avi, bmp, doc, gif, jpg, jpeg, mov, mp3, mpeg, mpg, pdf, png, ppt, ps, rtf, snd, swf, tif, tiff, txt, wav, wma, wmv, wps, xls, and xml.**

☐ Legal Documents

- ☐ Wills
- ☐ Deeds
- ☐ Revocable & Irrevocable Trusts
- ☐ Codicils (Supplements made to a will)
- ☐ Living Wills/Health Directives
- ☐ Prenuptial Agreements
- ☐ Buy/Sell Agreements
- ☐ Contracts

☐ Social Security and/or Veteran's Administration Info

☐ Insurance Policies (Life, LTC, Disability, Health, Auto, Property)

☐ Medical Records

☐ Bank & Investment Statements

- ☐ Pensions, IRAs, Annuities, Investment Accounts
- ☐ Stock Options/Certificates

☐ Liabilities

- ☐ Credit Cards list with contact information
- ☐ Mortgages
- ☐ Loans

☐ Taxes

- ☐ Tax Returns
- ☐ W-2 Forms

☐ Identification

- ☐ Birth Certificates
- ☐ Drivers Licenses
- ☐ Passports

☐ Family

- ☐ Adoption Papers
- ☐ Marriage License
- ☐ Photos, Audio Files, Video Clips, etc.

☐ Property

- ☐ Titles to Homes, Autos, Boats, etc.
- ☐ Warranties

☐ Employment Benefits

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