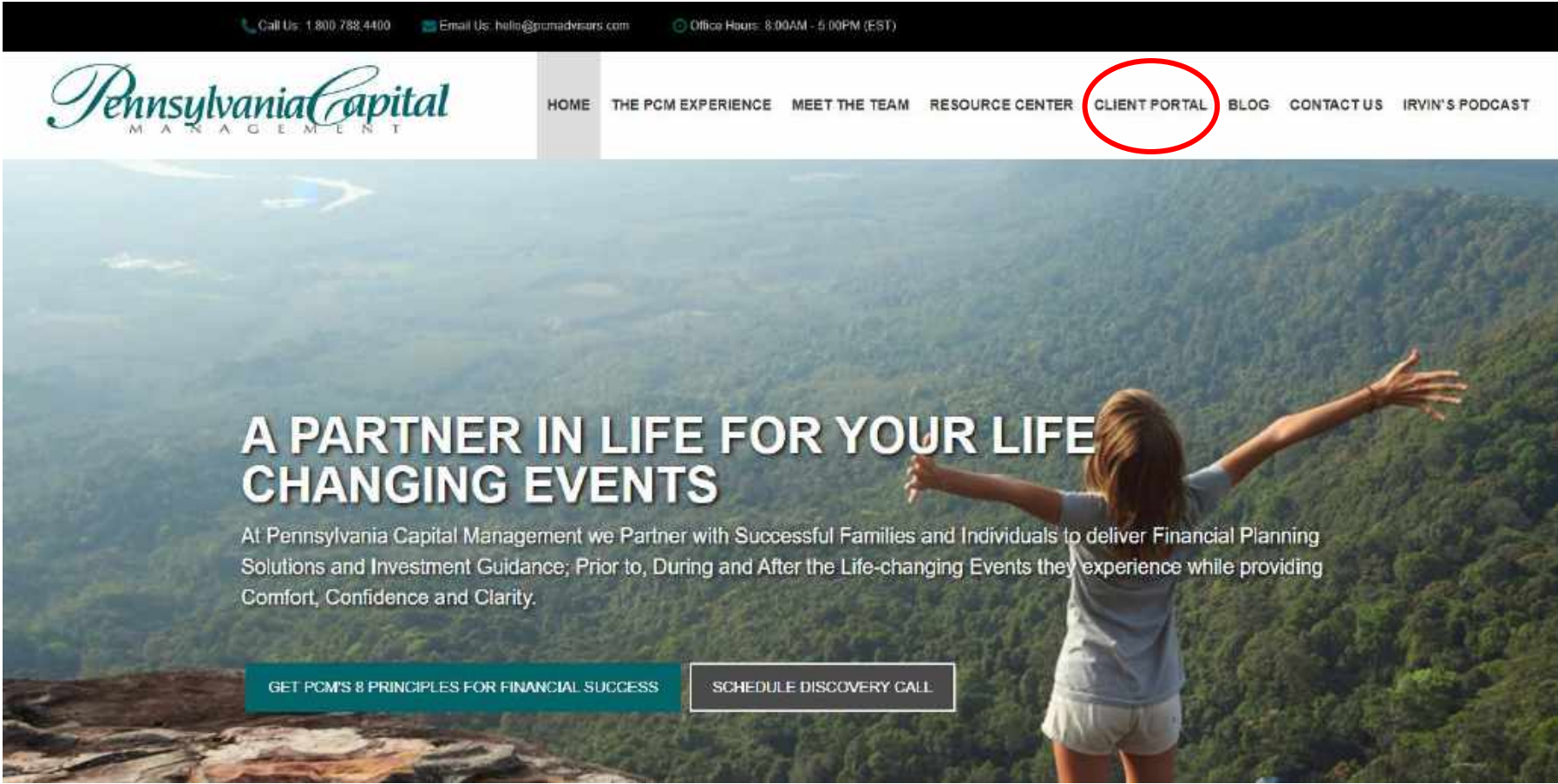




Client Portal Instructions

In a web browser, go to www.pcmadvisors.com. In the upper right corner, click on “Client Portal.”



Enter your username (your primary email address) and password.

Remember My Device

[Forgot password?](#)

If this is the first time you are logging in, and you are using a temporary password provided to you in an email from Orion, you will be asked to create a new password.



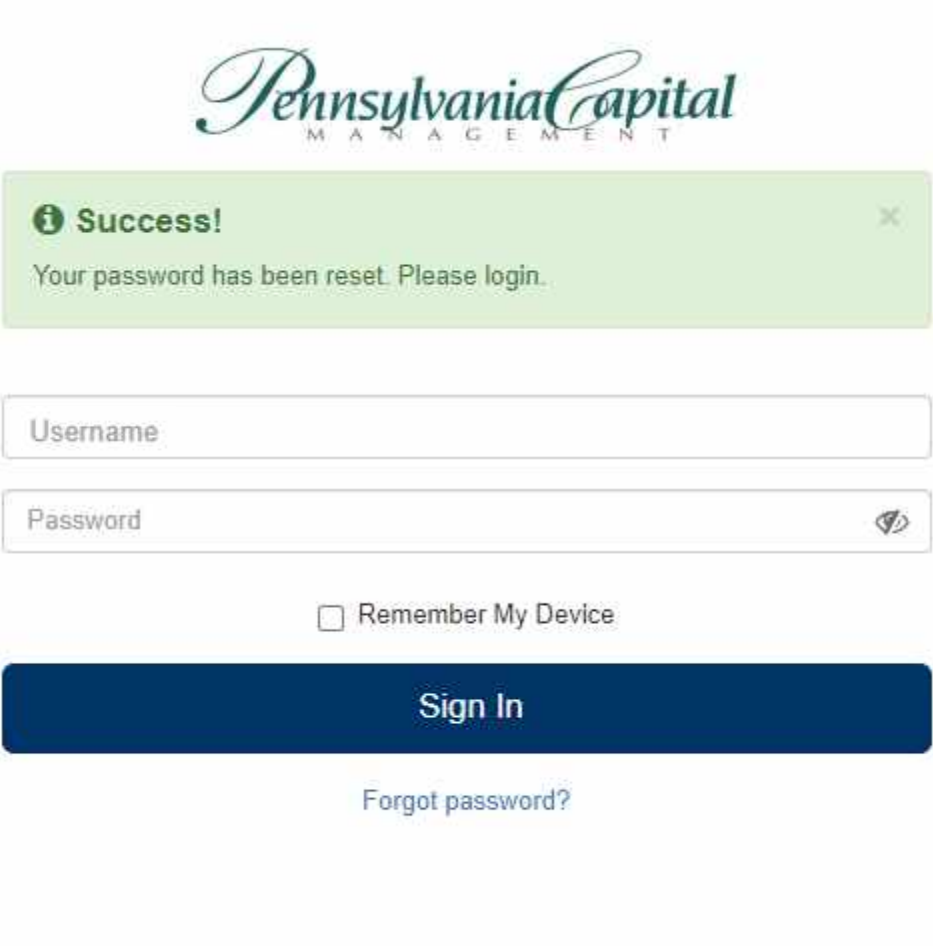
ⓘ Password Reset Required ✕
For your account security, please reset your password.

Password Strength:

- Uppercase and lowercase letter
- Number or Special Character
- 10 or more characters
- Does not contain date related words
- No variation of 'password', 'Orion', or 'advisor'
- Does not use your User ID

Reset Password

Once your password is reset, you can log in.



The screenshot shows the login interface for Pennsylvania Capital Management. At the top center is the logo for "Pennsylvania Capital MANAGEMENT" in a green serif font. Below the logo is a light green success message box with a close button (X) in the top right corner. The message reads: "Success! Your password has been reset. Please login." Below the message are two input fields: "Username" and "Password". The "Password" field has a toggle icon (an eye) on the right side. Underneath the password field is a checkbox labeled "Remember My Device". At the bottom of the form is a dark blue button with the text "Sign In". Below the button is a link that says "Forgot password?".

Once you are logged in, you have access to your **accounts** and **activity** in the Portfolio tab.

Pennsylvania Capital Management

PCM Sample Client Sample

Portfolio Documents Tools Updates Logout

Overview Holdings Activity

ALL ACCOUNTS \$0.00

Activity

01/01/2021 09/28/2021

VALUE ON

Total Value Net Invested

Important Disclosure Information Past performance may not be indicative of future results. The above individual account performance information reflects the reinvestment of dividends (to the extent applicable), and is net of applicable transaction fees, Pennsylvania Capital Management's investment management fee (if debited directly from the account), and any other related account expenses. Account information has been compiled solely by Pennsylvania Capital Management, has not been independently verified, and does not reflect the impact of taxes on non-qualified accounts. In preparing this report, Pennsylvania Capital Management has relied upon information provided by the account custodian. Please defer to formal tax documents received from the account custodian for cost basis and tax reporting purposes. Please remember to contact Pennsylvania Capital Management, in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you want to impose, add, to modify any reasonable restrictions to our investment advisory services. Please Note: Unless you advise, in writing, to the contrary, we will assume that there are no restrictions on our services, other than to manage the account in accordance with your designated investment objective. Please Also Note: Please compare this statement with account statements received from the account custodian. The account custodian does not verify the accuracy of the advisory fee calculation. Please advise us if you have not been receiving monthly statements from the account custodian. A copy of our current written disclosure statement discussing our advisory services and fees continues to remain available upon request.

YOUR ADVISOR

PENNSYLVANIA CAPITAL MANAGEMENT

215-891-7700
irvin@pcmadvisors.com
1841 Huntingdon Pike
Huntingdon Valley, PA 19006
Website

In the Documents tab, you have access to your quarterly statements and advisory fee notices.

The screenshot shows the Pennsylvania Capital Management website interface. At the top, the logo for Pennsylvania Capital Management is displayed. Below the logo is a navigation bar with tabs for Portfolio, Documents, Updates, Statements, and Cloud Storage. The Documents tab is currently selected. On the left side, there is a 'CATEGORIES' section with a button for 'PORTFOLIO STATEMENTS'. The main content area is titled 'Statements & Files' and includes a prompt to 'Select a file to download'. Below this, there is a table with columns for 'YEAR' and 'DESCRIPTION'. The 'YEAR' column has buttons for 2021, 2020, and 2018. The 'DESCRIPTION' column lists four documents: '4Q2021 Quarterly Income and Transaction Report', '4Q 2021 Quarterly Portfolio Report', '2Q2021 Quarterly Portfolio Report', and '2Q2021 Quarterly Income and Transaction Report'. Each document entry is preceded by a document icon.

YEAR	DESCRIPTION
2021	4Q2021 Quarterly Income and Transaction Report
2021	4Q 2021 Quarterly Portfolio Report
2021	2Q2021 Quarterly Portfolio Report
2021	2Q2021 Quarterly Income and Transaction Report

Important Disclosure Information Past performance may not be indicative of future results. The above individual account performance information reflects the reinvestment of dividends (to the extent applicable), and is net of applicable transaction fees, Pennsylvania Capital Management's investment management fee (if debited directly from the account) and any other related account expenses. Account information has been compiled solely by Pennsylvania

In the Documents tab, you also can securely upload documents to our cloud storage.

The screenshot displays the Pennsylvania Capital Management web interface. At the top left is the logo for Pennsylvania Capital Management. Below the logo is a navigation bar with five tabs: Portfolio, Documents, Updates, Statements, and Cloud Storage. The Cloud Storage tab is currently selected. Below the navigation bar, the page title is "Cloud Storage" with the subtitle "Download and upload files in the cloud". To the right of the subtitle are three buttons: Refresh, Add Folder, and Upload File(s). Below the buttons is a breadcrumb trail: Home / AdvisorShared. At the bottom of the screenshot is a table header with two columns: NAME and MODIFIED.


Under the “Updates” tab, you will find Irvin’s quarterly newsletters.

The screenshot shows the Pennsylvania Capital Management client portal. The top navigation bar includes 'Portfolio', 'Documents', 'Tools', 'Updates', and 'Logout'. Below the navigation bar, there is an 'ADVISOR CHECKLIST' section with a 'Create Task' button. The main content area is titled 'Advisor Commentary' and lists several quarterly newsletters with their dates and titles. On the right side, there is a 'YOUR ADVISOR' section with a profile picture and contact information for Pennsylvania Capital Management.

ADVISOR CHECKLIST
No active tasks found
Create Task

Advisor Commentary
Latest news and information from your advisor.

- Third Quarter 2021 Newsletter**
Riding the Wave
- Second Quarter 2021 Newsletter**
Light at the End of the Tunnel?
- First Quarter 2021 Newsletter**
Happy New Year!
- Fourth Quarter 2020 Newsletter**
The "Big Three"
- Third Quarter 2020 Newsletter**
Pondering the Pandemic
- 2nd Quarter 2020 Newsletter**
COVID-19 Q&A
- First Quarter 2020 Newsletter**
Happy New Year!
- Fourth Quarter 2019 Newsletter**
Happy Fall!

YOUR ADVISOR

PENNSYLVANIA CAPITAL MANAGEMENT

- 215-881-7700
- irvin@pcmadvisors.com
- 1841 Huntingdon Pike
Huntingdon Valley, PA 19006
- Website

Jul 28, 2021
May 17, 2021
Jan 25, 2021
Oct 21, 2020
Jul 22, 2020
Apr 17, 2020
Jan 24, 2020
Oct 14, 2019

Your login credentials and password will expire if you do not log in for six months.

If that occurs, please call your Client Service Team
at 215-881-7700 and we will be happy to assist you!

Pennsylvania Capital
M A N A G E M E N T