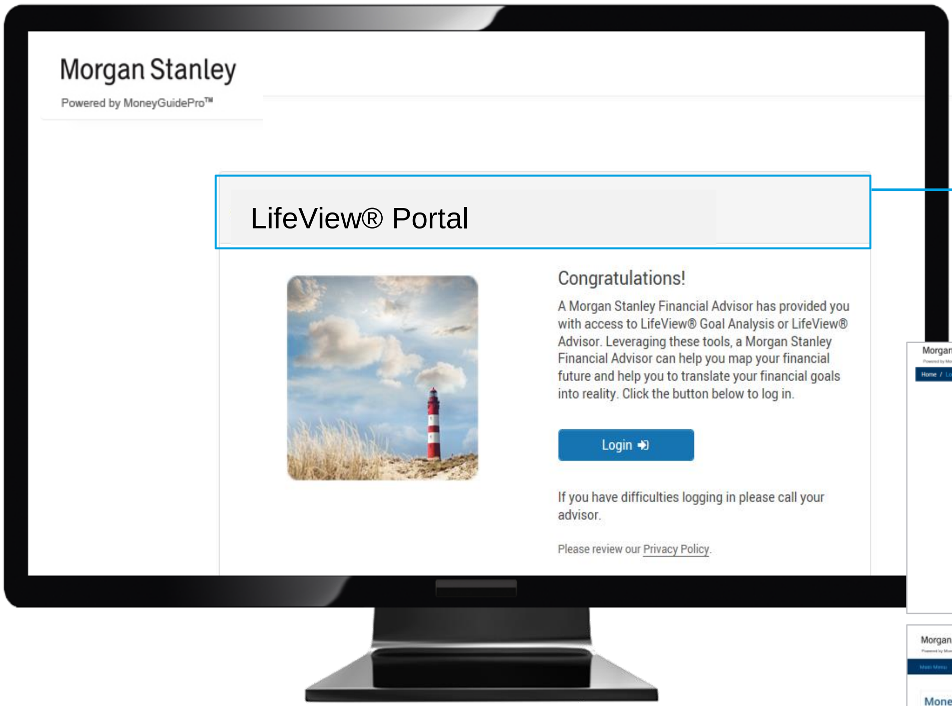
Morgan Stanley

Understanding

LifeView® Portal

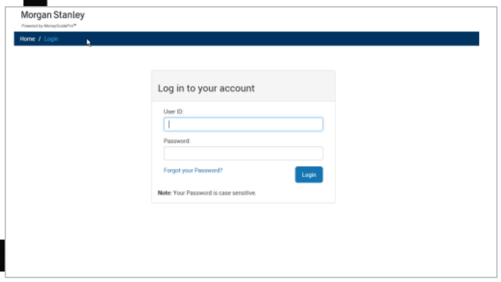
Morgan Stanley’s LifeView® Financial Planning tool’s client portal, LifeView® Portal, provides your Financial Advisor with more robust financial planning capabilities, while giving you an easier and more intuitive user experience.

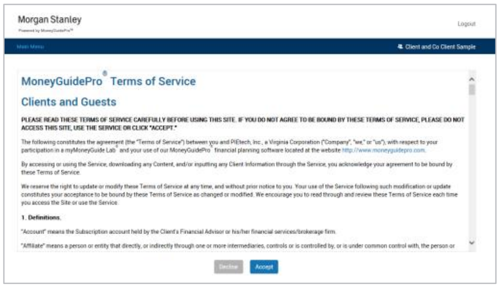
The link provided to you by your Financial Advisor will take you to the LifeView® Portal. See how it works.



LifeView® Portal

Personal log in information and **Terms of Service**





Contact your Financial Advisor to schedule time to review the portal, or if you require a reminder of your login information.

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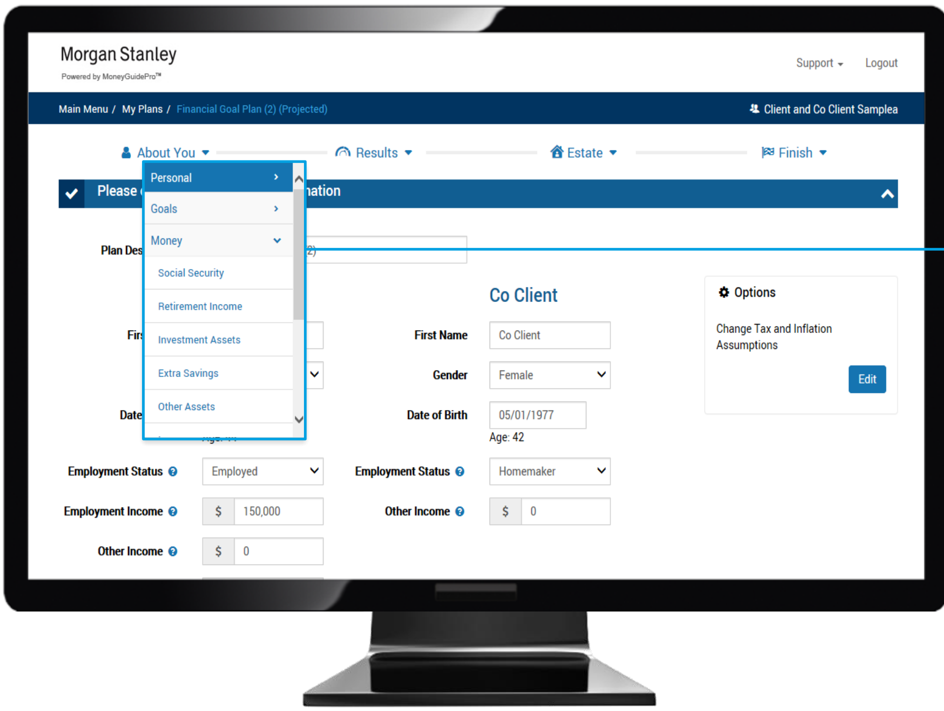
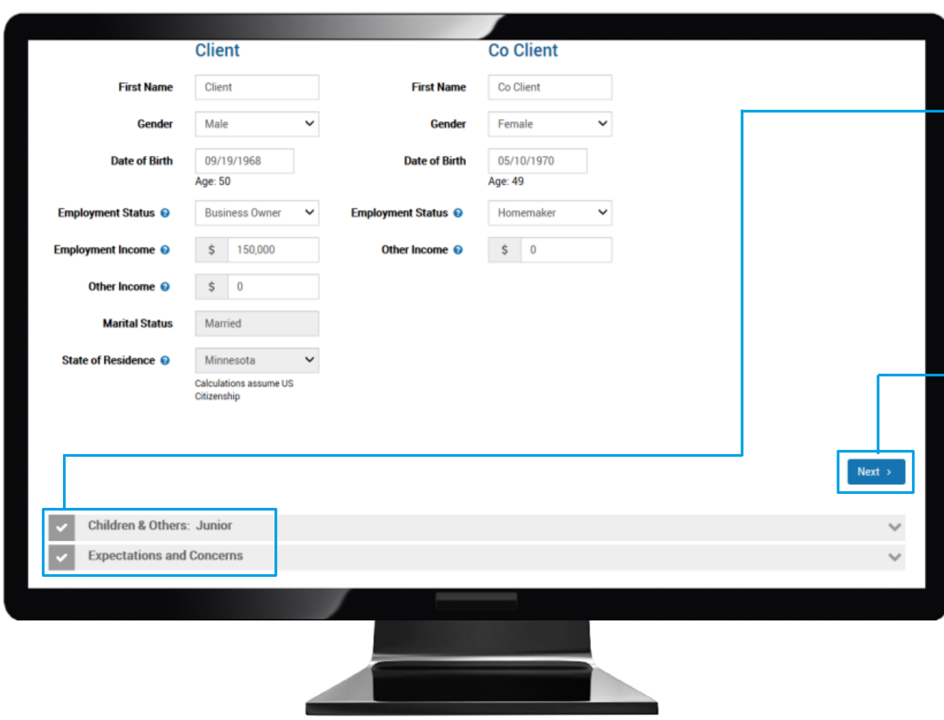
Ways to Navigate through the tool.



1. Drop Down



2. Click on **Navigation Bars** to skip to desired section

3. **Next Button** to advance to next screen

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Disclosures

A LifeView Financial Goal Analysis or LifeView Financial Plan ("Financial Plan") is based on the methodology, estimates, and assumptions, as described in your report, as well as personal data provided by you. It should be considered a working document that can assist you with your objectives. Morgan Stanley makes no guarantees as to future results or that an individual's investment objectives will be achieved. The responsibility for implementing, monitoring and adjusting your goal analysis or financial plan rests with you. After your Financial Advisor delivers your report to you, if you so desire, your Financial Advisor can help you implement any part that you choose; however, you are not obligated to work with your Financial Advisor or Morgan Stanley.

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