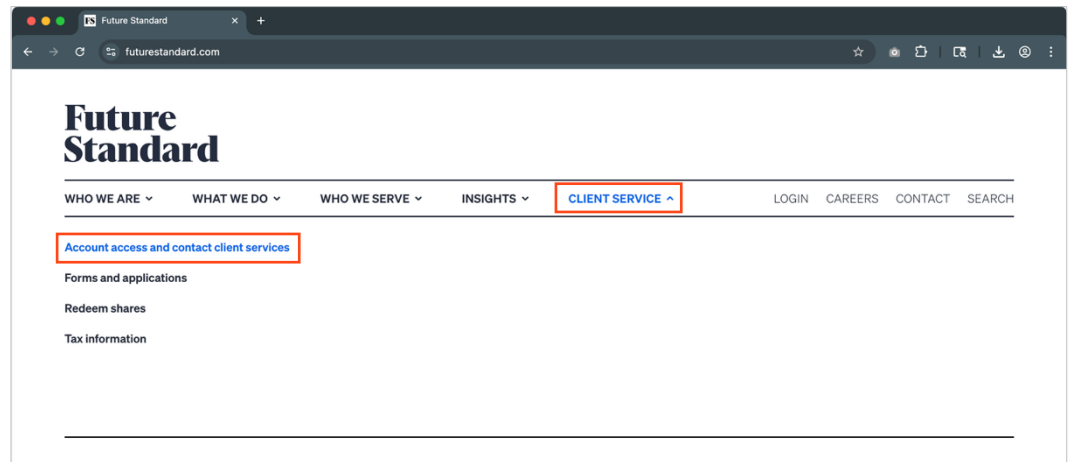


ADVISOR GUIDE FOR PULLING TRANSACTION HISTORY

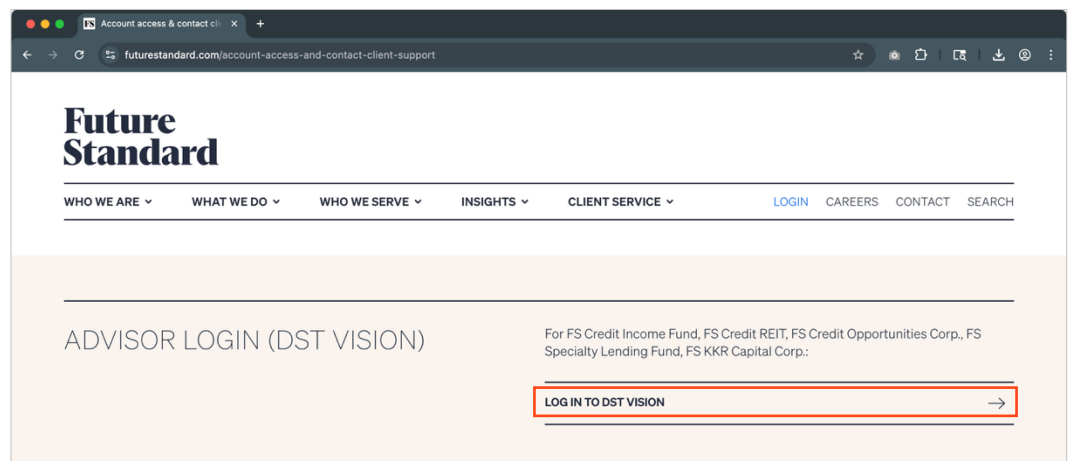
STEP 1

Access DST Vision by going to www.futurestandard.com, clicking on **Client Services** and selecting **Account access and contact client services**.



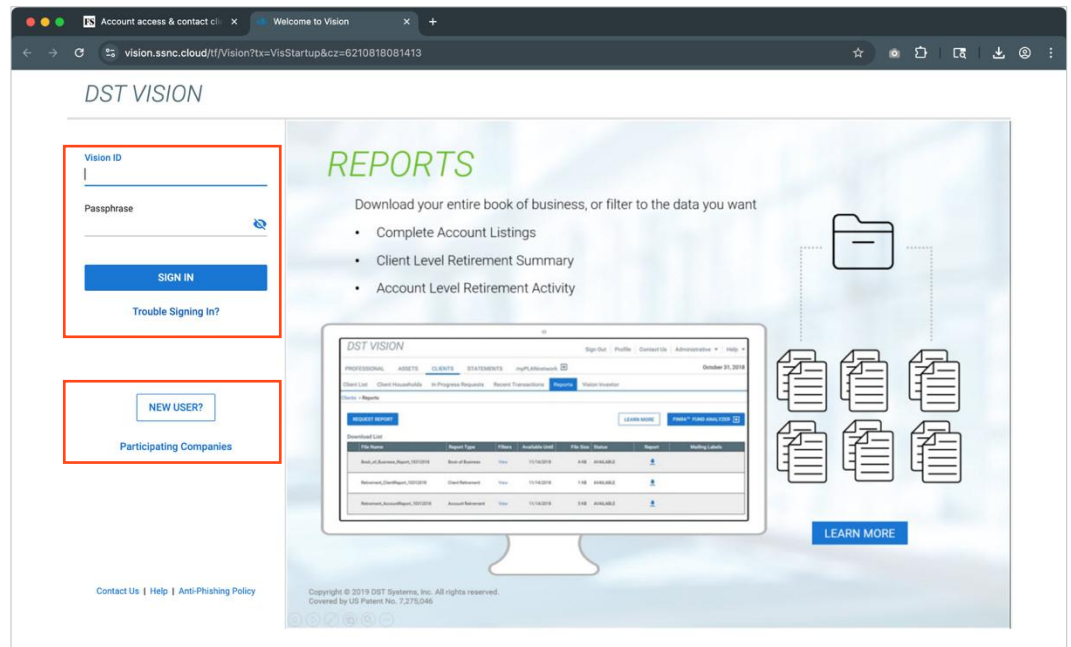
STEP 2

Select **Log in to DST vision**



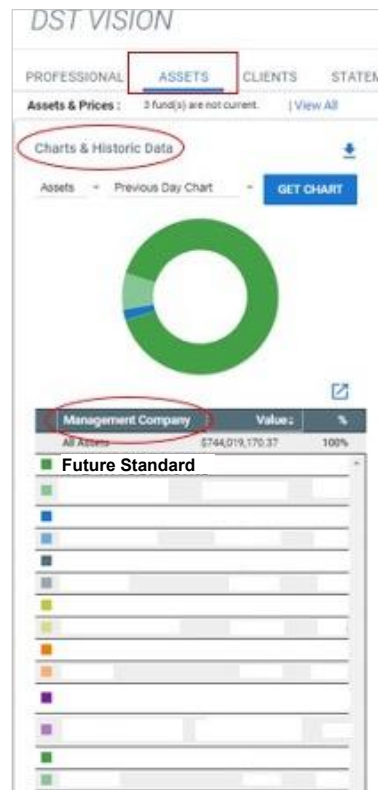
STEP 3

Log in to DST Vision with your **username** (Vision ID) and **password** (passphrase).
(If you do not have a DST Vision ID, enroll by selecting the **New User** link).



STEP 4

Within the **Assets** tab, select **FS Investments** under the **Asset Totals** donut chart.



STEP 5

On the left side of the **Mgmt. Co Asset Summary** page, select **Search by Rep/Advisor Number**.

STEP 6

On the Rep/Advisor Number search,

Option 1: Filter for the desired fund.

Option 2: Complete the **Dealer** and **Rep/Advisor #** field (if you are approved for more than one rep number, you will need to select which one you wish to view).

STEP 7

Click **Search** and the results will show all accounts within the selected fund, under the rep number entered, and the results will be sorted by registration name.

STEP 8

The list of accounts obtained via the search results, outlined in the previous steps, may be used to view transaction history and other individual account information. The standard method of viewing transaction history is by looking up the account under the **Clients** tab.

The screenshot displays the myPLANnetwork interface. At the top, there are navigation tabs: PROFESSIONAL, ASSETS, CLIENTS (highlighted with a red circle), and STATEMENTS. Below these, a sub-navigation bar includes Client List, Client Households, In Progress Requests, Recent Transactions, Assets & Prices, Reports, and Vision Investor. The main content area is titled 'Clients > Client Accounts > Account Details' and 'Account Overview'. On the left, a sidebar menu lists various options: Statements / Tax Forms, Details, Acct Overview (highlighted with a red circle), Historic Acct Values, Transaction History, Beneficiary & 529 Details, Breakpoint Center, and Rights of Accumulation. The main content area is divided into two sections. The top section, 'TEST FUNDS', contains fields for Account #, Registration, Mgmt Co, Fund Name, Phone #, Fund Code, Ticker, CUSIP, and Account Type. A 'PRINT REPORTS' button is also present. The bottom section displays account details, including Shares (Issued, Unissued, Escrow, Total), NAV (as of 08/27/2018), NAV % Change, Account Value, Daily Dividend Accrual, Active Account Options, Audio Response, Language English, Telephone Check Redemption, Telephone Exchange, Dealer of Record Name, Dealer #/Branch #, Rep/Advisor Name, Rep/Advisor #, NSCC Firm #/Agent, Capital Gains, Dividends, Date Established, Last Maintenance, Matrix Level, BIN, Name Search Code, ROA #, Letter of Intent #, Trust Name, and Trust #.

If you encounter any issues logging in or with navigation, please reach out to DST Vision at 800-435-4112.