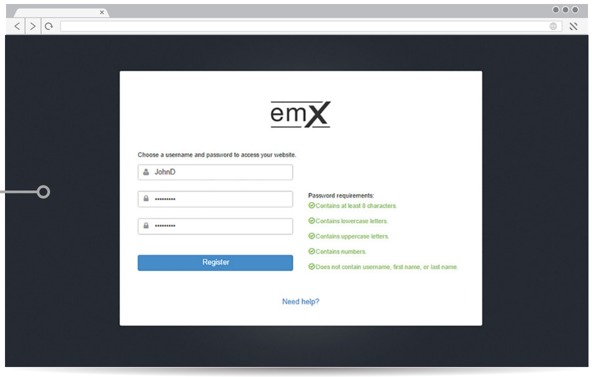
YOUR PERSONAL FINANCIAL WEBSITE

A Guide to Getting Started

Manage your wealth *and* your well-being

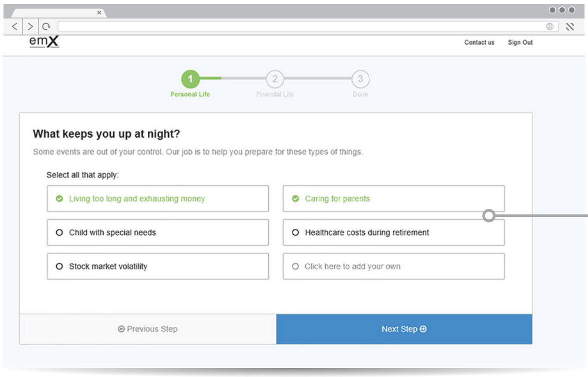
Your Personal Financial Website helps you see your financial life beyond the numbers. And with our automated fact finding questionnaire, you can get started with your Personal Financial Website on your own in just a few easy steps.



STEP 1

Register for your financial website

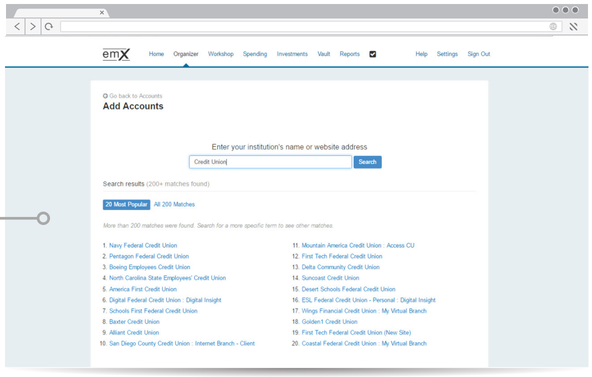
Click the link sent to your inbox to get started.
Then, create your own secure user name and password.



STEP 2

Complete the series of introductory questions

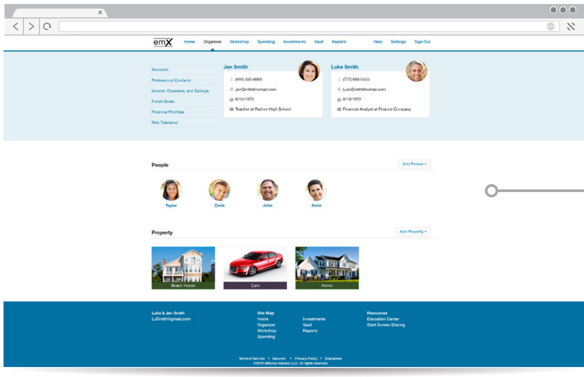
Answer a few basic questions to help us understand your current finances and future goals.



STEP 3

Connect your financial accounts

From your Homepage, click on Organizer, then Accounts to start adding your financial institutions, like bank and credit accounts.

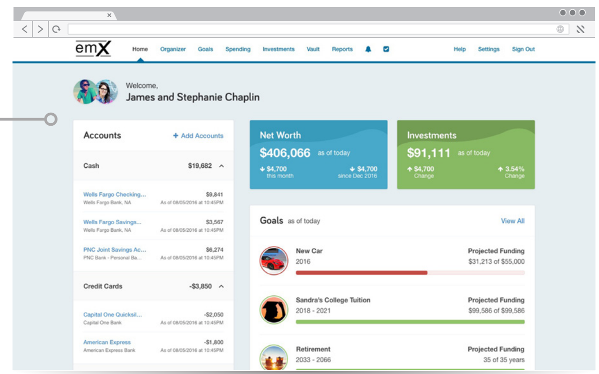


STEP 4
Personalize your website

Customize your website by adding photos of what your wealth represents—the people and things most important in your life.

STEP 5
See your finances come to life

Easily organize and track your financial goals with spending and budgeting tools, investment monitoring, and more.



Now you're ready to start managing your wealth with your personal financial website!

By combining our personal digital experience with the professional guidance only a trusted advisor can provide, we can work together to build and monitor a financial plan that fits your needs.