ADVICEWORKS®

Getting Started with AdviceWorks®

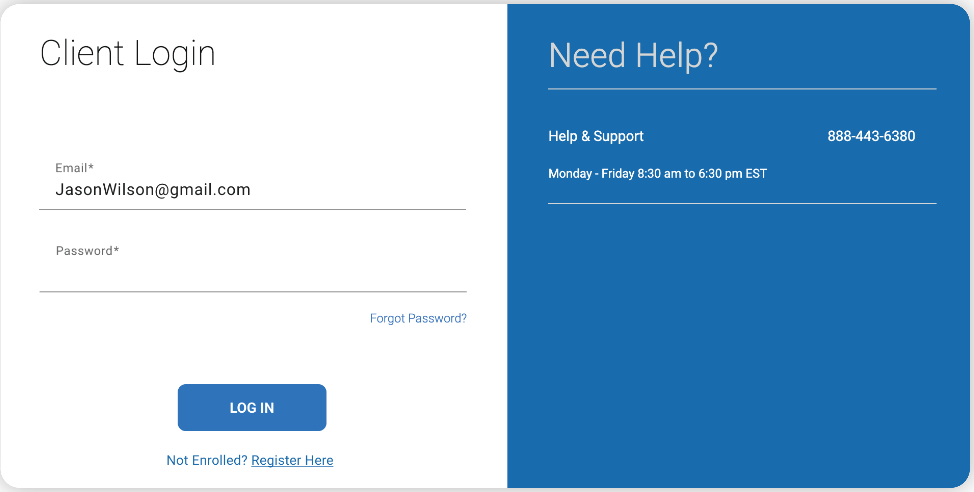
Put the clarity, convenience, and security of AdviceWorks to work for you!

AdviceWorks is designed to simplify how you see, understand, and manage your finances, and make it easier for you and your financial professional to work together. It's a powerful tool to help you pursue your financial goals. There's no better time than now to start using all it has to offer.

Let's get started!

Step 1: Log In

Starting with the **enrollment email from your financial professional,** you will be prompted to complete four simple steps to activate AdviceWorks. Keep your cell phone handy, as you will receive a security code by text for multi-factor authentication verification.



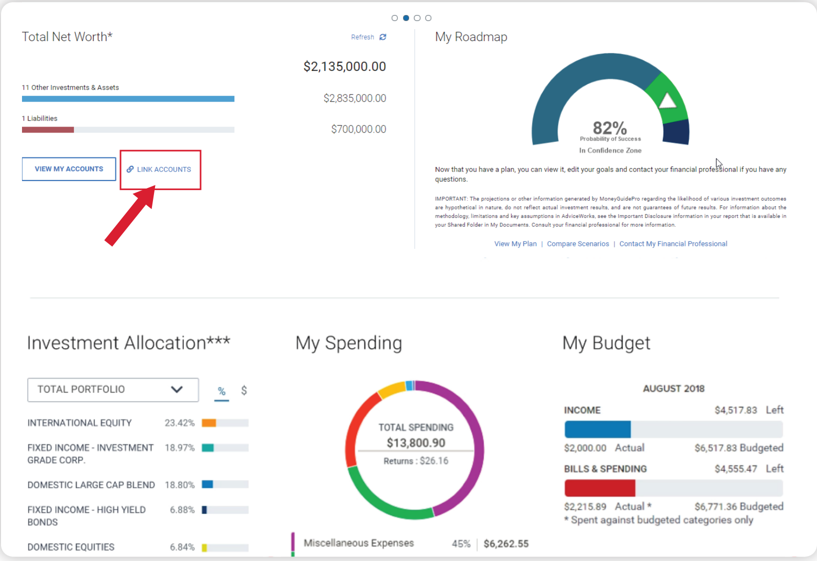
Bookmark AdviceWorks:
https://client.adviceworks.net/auth/login

Help and Support:
888.443.6380

Step 2: Link Accounts

From your AdviceWorks dashboard, select **Link Accounts** in **Total Net Worth.** You will be prompted to select from a list of common financial institutions, or you can enter your own. Simply provide your username and passcode to link the accounts. Note that you can only use the budgeting tools if you link your bank account(s).

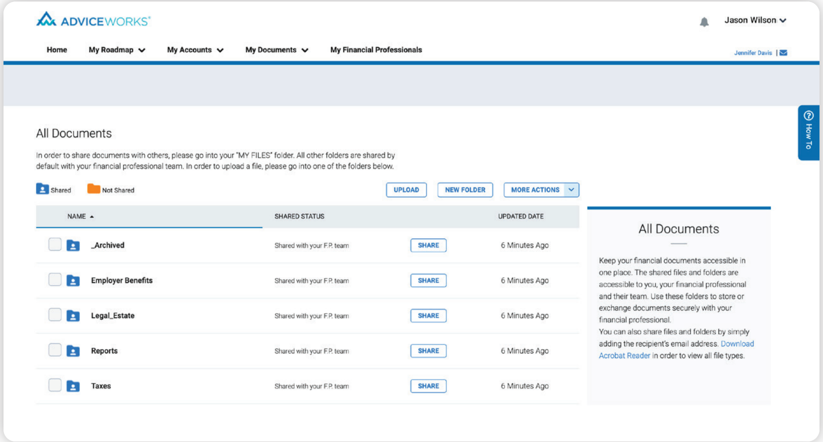
> With one login you can access all your accounts including checking, savings, mortgage, and more. Those that are linked will automatically be updated with the most current values. All your information is protected and continuously monitored with robust security systems.



Step 3: My Docs

Select the My Docs tab to find your **shared and private folders.** Within your shared folder, you can add documents or access reports and information from your financial professional. You can create and add to private folders as needed to organize documents the way you like.

> **Shared folders** enable you to securely collaborate with your financial professional and access statements, account information, tax documents, and more.
>
> **Private folders** allow you to securely store passports, wills, trusts, or any other documents you wish, giving you convenient access from any device at any time. These documents cannot be accessed by your financial professional.

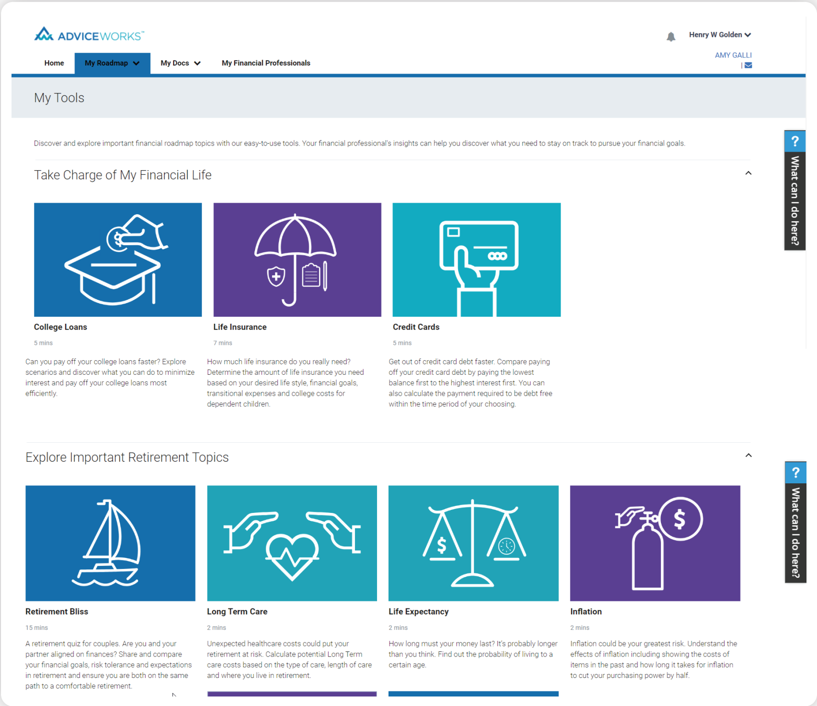


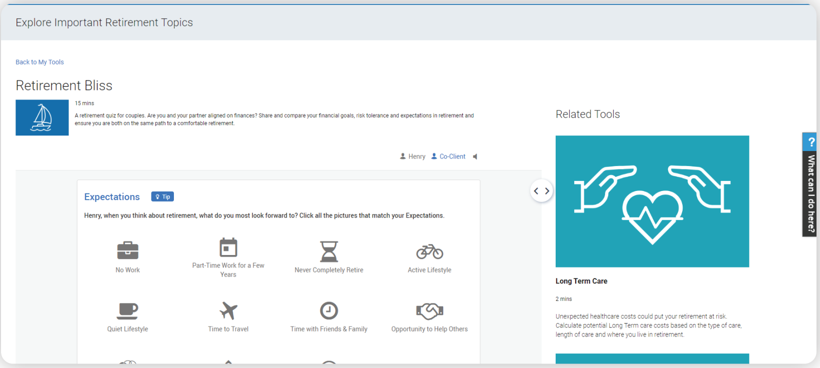
Step 4: My Roadmap

My Tools helps you set goals through quick educational modules or creating a full financial strategy in collaboration with your financial professional. If you are new to AdviceWorks, you can select **Get Started Now** to provide information on your current situation and goals. If you already have a strategy, you can **Compare Scenarios** to test different circumstances that may affect your probability of success meter.

Tools provides short, educational modules to focus in on a specific strategy need or goal. Try out different modules based on your interests.

You can also compare results with your partner to help discuss and define family goals.

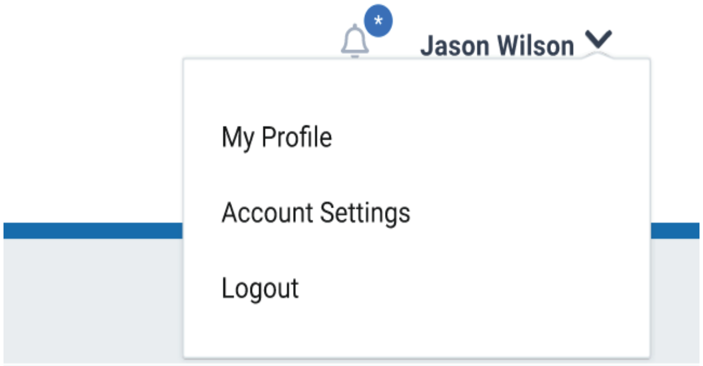


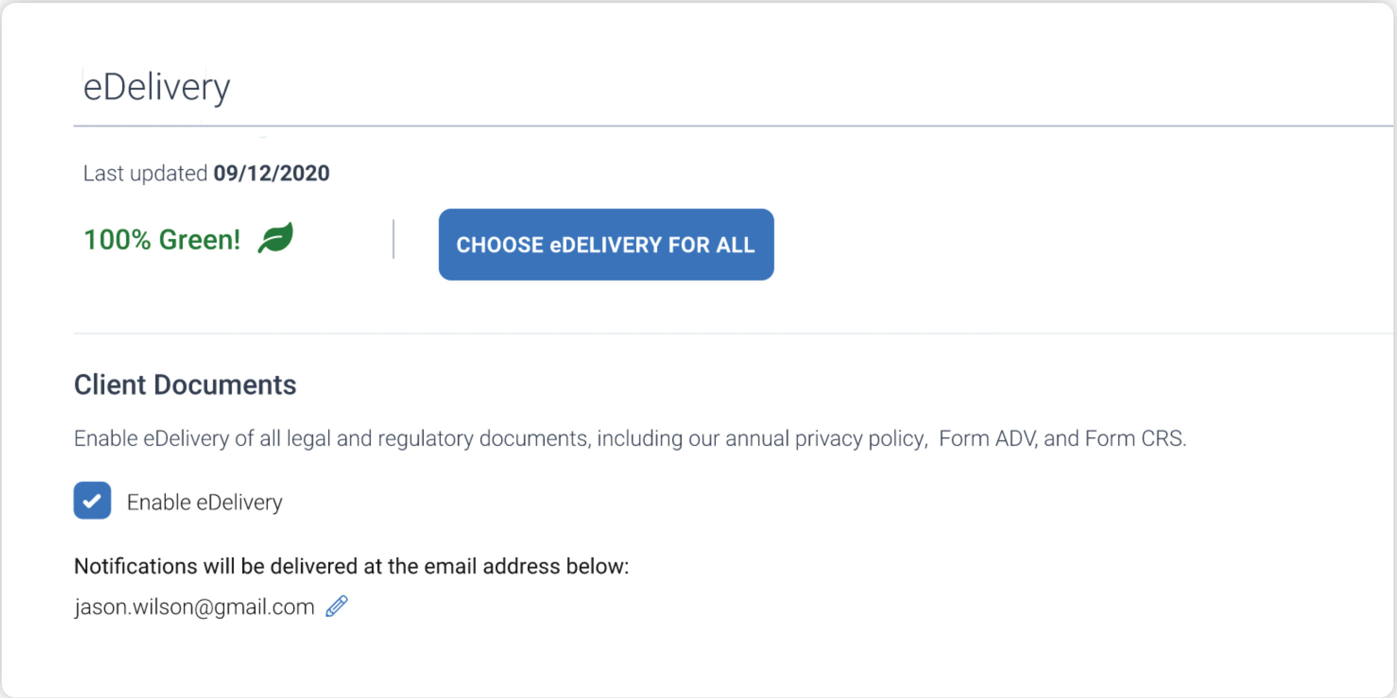


Step 5: eDelivery

From your Home page, click on your name and select **My Account Settings**. Scroll down the page to eDelivery and select the eDelivery option for eligible documents you prefer to receive online.

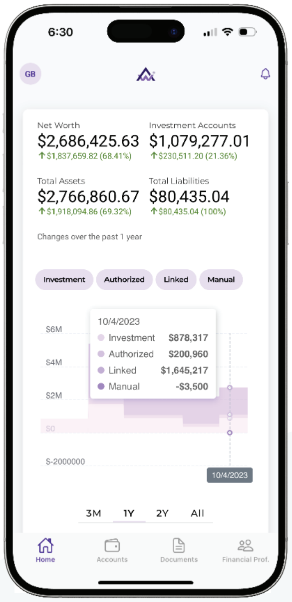
You're all set!





You can now say goodbye to lengthy paper documents and enjoy anytime, anywhere access to financial statements, confirmations, and more—all in a secure environment.

If you have any technical questions about AdviceWorks, please contact our Help & Support Team at **888.443.6380**. For all other questions, please contact the office.



Get AdviceWorks® on-the-go.
Download the AdviceWorks Client Access app in the App Store or Google Play!

Download on the App Store

GET IT ON Google Play