

YOUR CLIENT PORTAL QUICK START GUIDE



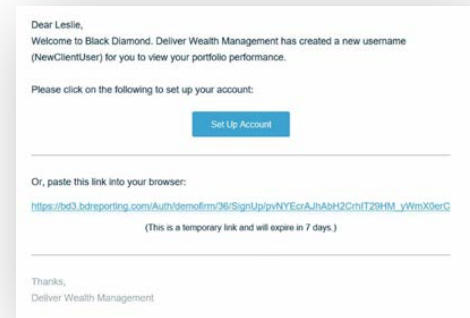
FAMILY WEALTH
SOLUTIONS



GAIN ACCESS TO YOUR PERSONAL FINANCIAL PORTAL TODAY

Step One:

- The first step in accessing your accounts within the Client Portal is to receive an invitation from your Financial Advisor or a member of their team.
- You will receive a “New User Setup” email as the example shown here.
- This email will come “from” us and a “no reply” email address of noreply@bdreporting.com.
- Included in this email is a link to set up your account. Please click on the “Set Up Account” button or copy and paste the full website into your browser.
- For security purposes, your setup link will expire after 7 calendar days.
- Should the link expire, let us know and we will be happy to resend the email with a new setup link.



Step Two:

- Upon clicking the link within the email (or copying and pasting it into your browser), you will be prompted to set security questions.
- It is required you choose a security question from the preexisting lists and set up all three questions.
- To continue, click “Next.”

Step Three:

- Next, you will need to set a secure password.
- Please enter a chosen password in the first form field. Then re-type your password in the second form field under “Confirm Password.”
- If your password meets security requirements and matches between the two form fields, you may then click “Next.”

Step Four:

- At this time, you will also receive a second email letting you know your password has been updated.
- This email will once again come “from” us and a “no reply” email address of noreply@bdreporting.com.

YOUR PERSONALIZED CLIENT PORTAL

From your portal, you have access to unique information and insights, account details, your investment dashboard, a document vault, instant access from any of your devices, and more. In addition to accessing the portal on your desktop or laptop computer through the Client Access tab on famwealthsolutions.com, it is also available on Apple or Android devices.

Downloading The Portal App

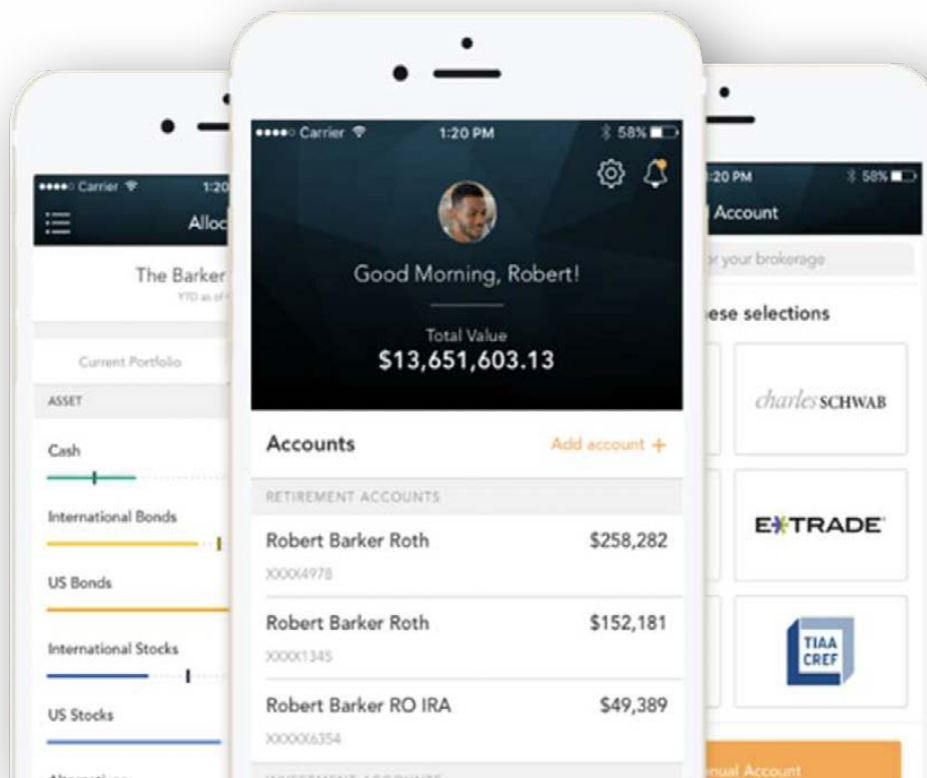
Apple Device:

- On your iPhone or iPad, from the home screen, open the App Store app.
- To search for apps by name, tap Search (at the bottom) then enter “Family Wealth Solutions”.
- Tap the GET button to install the app for free.
- If prompted, sign in to the App Store to complete the install.

Android Device:

- On your device, open the Play Store app.
- The Google Play Store will open; select Apps.
- To search for apps by name, tap the text box at the top of the page and enter “Family Wealth Solutions”.
- Tap on the Install button and follow the instructions to install the app for free. It may ask you permissions to continue, tap Accept.

When you log in, you'll see your personalized home page. Across the top of your browser, you have quick access to the other pages of your portal. If you are using the mobile app, your other pages are found in the menu in the top left. You can stay connected to us with clickable links to phone numbers, emails, and our office location directly on the home page.



YOUR PORTAL EXPERIENCE

Home Page	At-a-glance view of pertinent account information
Portfolio	Dynamic view of your entire portfolio
Vault	Easily keep track of and share your important financial and legal documents
Net Worth	A detailed list of your accounts and balance sheet report with aggregation capabilities
Login Questions	Helpful hints



QUESTIONS:

If you have any questions, please reach out to our team and we will be happy to assist.

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