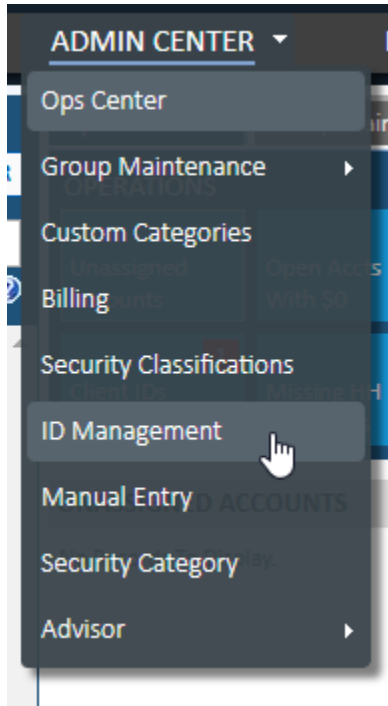


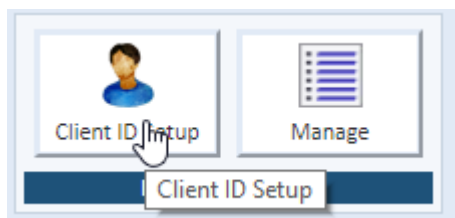
Setting up a client in Portfolio Pathway

Log into PortfolioPathway.com using the following link: <https://advisor.portfoliopathway.com/>

Once logged in go to Admin Center > ID Management



To begin the process of setting up the new client ID client on Client ID Setup



This will bring you to the Initiate Client ID setup screen. Complete the areas highlighted below. You will need to ensure you have the proper email address and the name of the household in Portfolio Pathway they are associated with in order to completed this step.

SET UP CLIENT ID

INITIATE CLIENT ID

This ID will be used for myfinancialaccount.com as well as the Portfolio Pathway Client View mobile app.

Email greeting: (i.e. Dear John)

Email:

Select household to associate:

In order to complete the process, your client will need to click a link that directs them to the website for validation. The link is in the email template that you can copy into your clipboard or draft in your default desktop email application.

[COPY EMAIL TO CLIPBOARD](#) [LAUNCH IN EMAIL APPLICATION](#)

Once completed you can either choose to copy the email to the clipboard and paste it into Outlook or you can Launch the email directly into the email application being utilized. Please note that an email address cannot be utilized more than once. You will receive an error message if it is already in the system as a user.

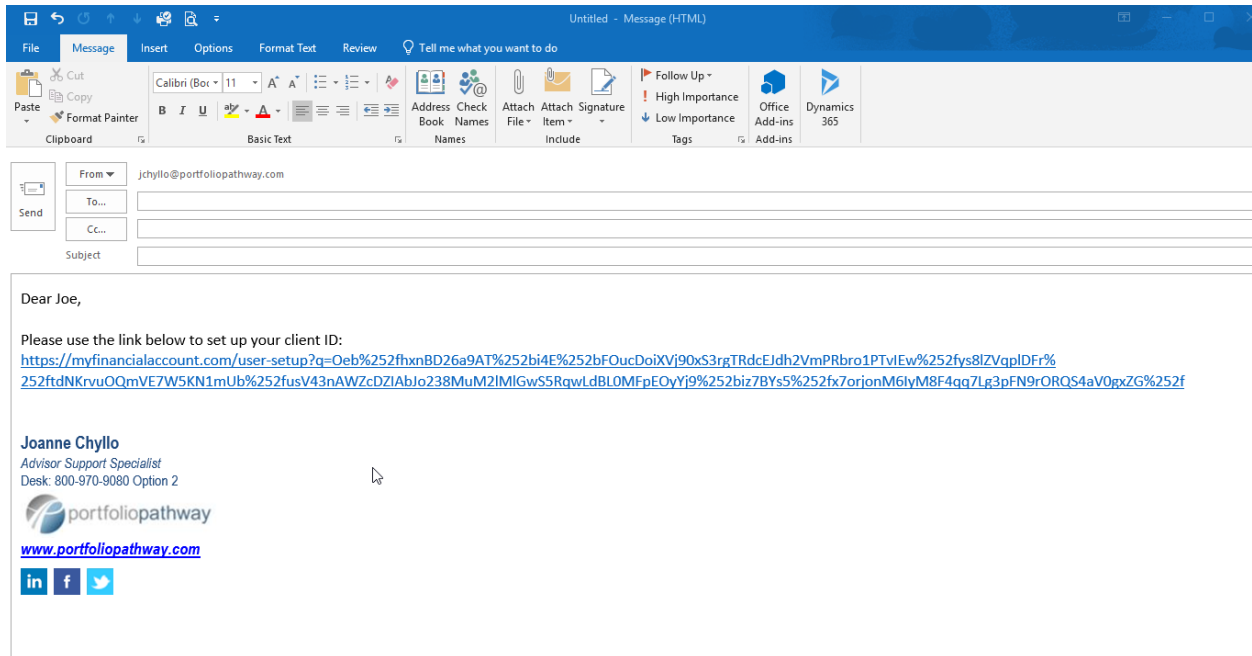
or draft in your default desktop email application.

COPY EMAIL TO CLIPBOARD

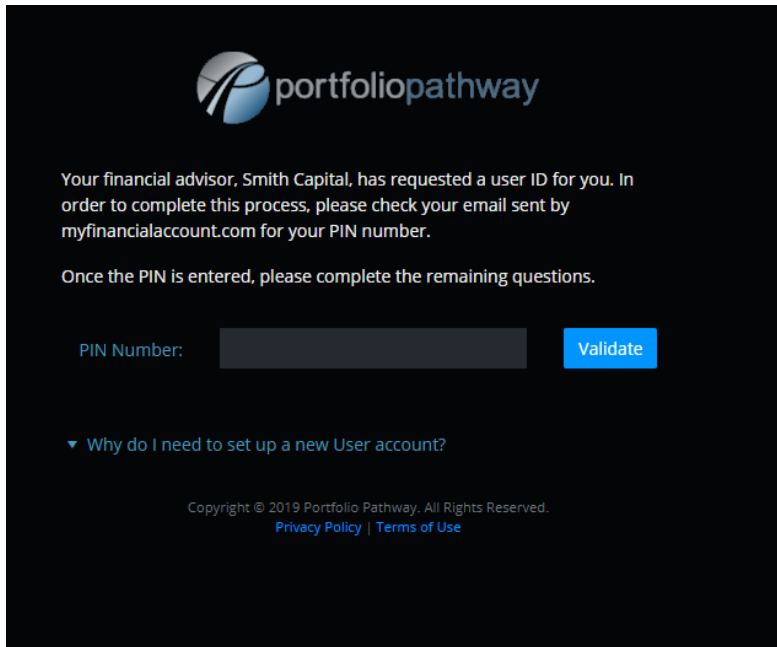
LAUNCH IN EMAIL APPLICATION

This user is already associated with a different household. If you wish to resend the email, please do so from the ID Management page.

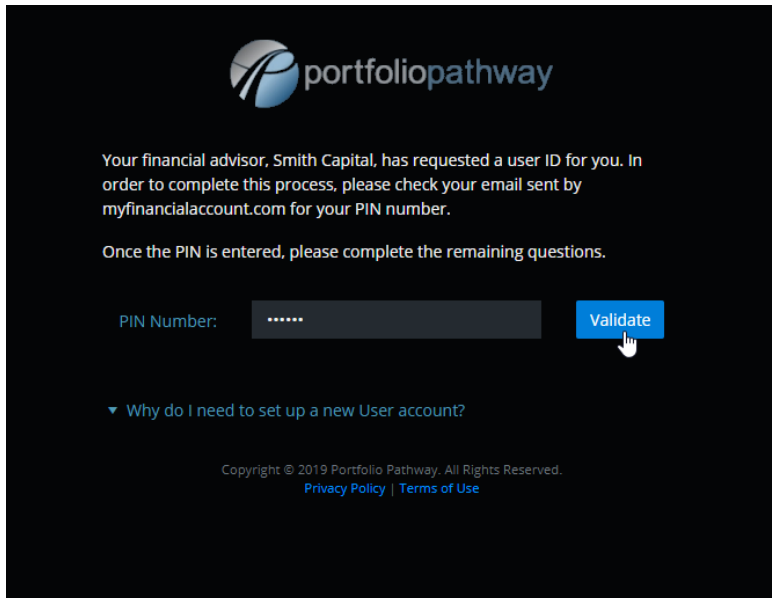
The email will look similar to the one below:



Once the client clicks on the email link provided in the email Portfolio Pathway's system will automatically generate another email to that individual that will provide a unique PIN number that will need to be used to complete the validation.



They will need to enter the PIN number provided in that email and hit Validate



Once they hit Validate it will bring them to a Sign up screen. They will need to provide the details below and hit Create User.

Sign Up for Y

Name: Dear Joe

Password:


Confirm Password:

Security Question:

Security Answer:

▼ Why do I need to

Copy



DemoClient

.....

Remember my username

SIGN IN

Forgot *username* or *password*?

Download on the **App Store** | GET IT ON **Google Play**

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Once that is completed they will have a User Account created for access to Portfolio Pathway using the link: <https://www.myfinancialaccount.com/Trustmontgroup/login>