Setting up a client in Portfolio Pathway

Log into PortfolioPathway.com using the following link: <u>https://advisor.portfoliopathway.com/</u> 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 CLENT ID						
INITIATE CLIENT ID	INTIATE CLENT ID					
This ID will be used for r	nyfnancialaccount.com as well as the Portfolio Pathway Client View mobile app.					
Email greeting:	(i.e. Dear John)					
Email:						
Select household to associate:	Tipe a household name					
In order to complete the	process, your client will need to click a link that directs them to the website for volidation. The link is in the email template that you can copy into your clipboard or draft in your debuit desktap 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.

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The email will look similar to the one below:

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Form j.chyllo@portfoliopathway.com Send Subject Dear Joe, Please use the link below to set up your client ID: https://myfinancialaccount.com/user-setup?q=Oeb%252fhxnBD26a9AT%252bi4E%252bFOucDoiXVi90x53rgTRdcEIdh2VmPRbro1PTvIEw%252fys8lZVqpIDFr% 252ftdNKrvuOQmVE7W5KN1mUb%252fusV43nAWZcD2IAblo238MuM2IMIGw55Rqwt.dBI0MFpEOvyfj%252biz7BYs5%252fx7orjonM6lyM8F4qq7Lg3pFN9rORQS4aV0gx2G%252f Joane Chyllo Advior Support Specialist Deak: 300:970-980000tion 2 Totfoliopathway.com Totfoliopathway.com	Paste	6 Cut ≧ Copy ≸ Format Paint pboard	Calibri (Boc v 1 B I U a	1 • A* A* ∷ = ✓ • ▲ • 三 = Basic Text	- 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1	ddress Check Book Names Names	Attach Attach Signature File - Item Include	 Follow Up * High Importance Low Importance Tags Importance 	Office Add-ins Add-ins	Dynamics 365		
Dear Joe, Please use the link below to set up your client ID: https://myfinancialaccount.com/user-setup?q=Oeb%252fhxnBD26a9AT%252bi4E%252bFOucDoiXV/90xS3rgTRdcEJdh2VmPRbro1PTvIEw%252fys8lZVqplDFr% 252ftdNKrvuOQmVE7VV5KN1mUb%252fusV43nAWZcDZIAbJo238MuM2IMIGwS5RqwLdBLOMFpEOyY/9%252biz7BYs5%252fx7orjonM6lyM8F4qq7Lg3pFN9rORQS4aV0gxZG%252f Joanne Chyllo Advisor Support Specialist Desk: 800-970-9080 Option 2 im f im f	۲ Send	From To Cc Subject	jchyllo@portfoliopa	thway.com								
Joanne Chyllo Advisor Support Specialist Desk: 800-970-9080 Option 2 portfoliopathway www.portfoliopathway.com in f	Dear Please <u>https:</u> 252ft	Dear Joe, Please use the link below to set up your client ID: https://myfinancialaccount.com/user-setup?q=Oeb%252fhxnBD26a9AT%252bi4E%252bFOucDoiXVj90xS3rgTRdcEJdh2VmPRbro1PTvIEw%252fys8lZVqplDFr% 252ftdNKrvuOQmVE7W5KN1mUb%252fusV43nAWZcDZIAbJo238MuM2IMIGwSSRqwLdBL0MFpEOyYj9%252biz7BYs5%252fx7orjonM6lyM8F4qq7Lg3pFN9rORQS4aV0gxZG%252f										
	Joan Adviso Desk: 8 WWW.	r Support Spe 300-970-9080 portfoliopa f	ecialist) Option 2 iopathway Ithway.com		2							

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.

portfoliopathway								
Your financial advisor, Smith Capital, has requested a user ID for you. In order to complete this process, please check your email sent by myfinancialaccount.com for your PIN number.								
Once the PIN is ente	Once the PIN is entered, please complete the remaining questions.							
PIN Number:			Validate					
▼ Why do I need to	▼ Why do I need to set up a new User account?							
	right © 2019 Portfolio Pathway. All Rights Reserve Privacy Policy Terms of Use							

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

portfoliopathway							
Your financial advise order to complete t myfinancialaccount	Your financial advisor, Smith Capital, has requested a user ID for you. In order to complete this process, please check your email sent by myfinancialaccount.com for your PIN number.						
Once the PIN is ente	Once the PIN is entered, please complete the remaining questions.						
PIN Number:		Validate					
▼ Why do I need to	▼ Why do I need to set up a new User account?						
	Copyright © 2019 Portfolio Pathway. All Rights Reserved. Privacy Policy Terms of Use						

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.



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