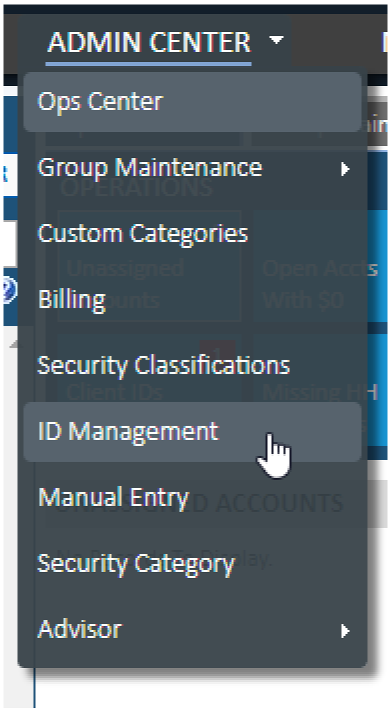
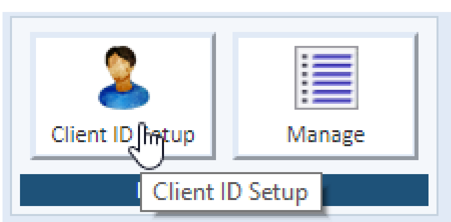
<u>Setting up a client in Portfolio Pathway</u>

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

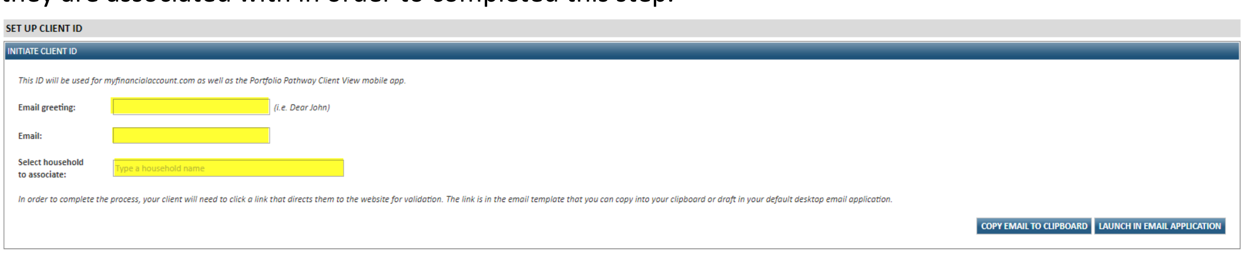
Once logged in go to Admin Center > ID Management



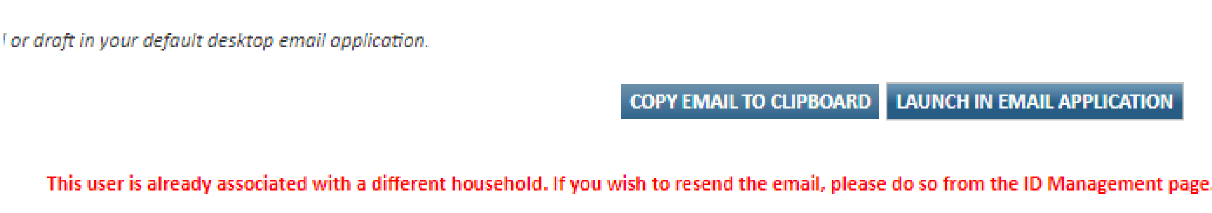
To begin the process of setting up the new client ID client on Client ID Setup



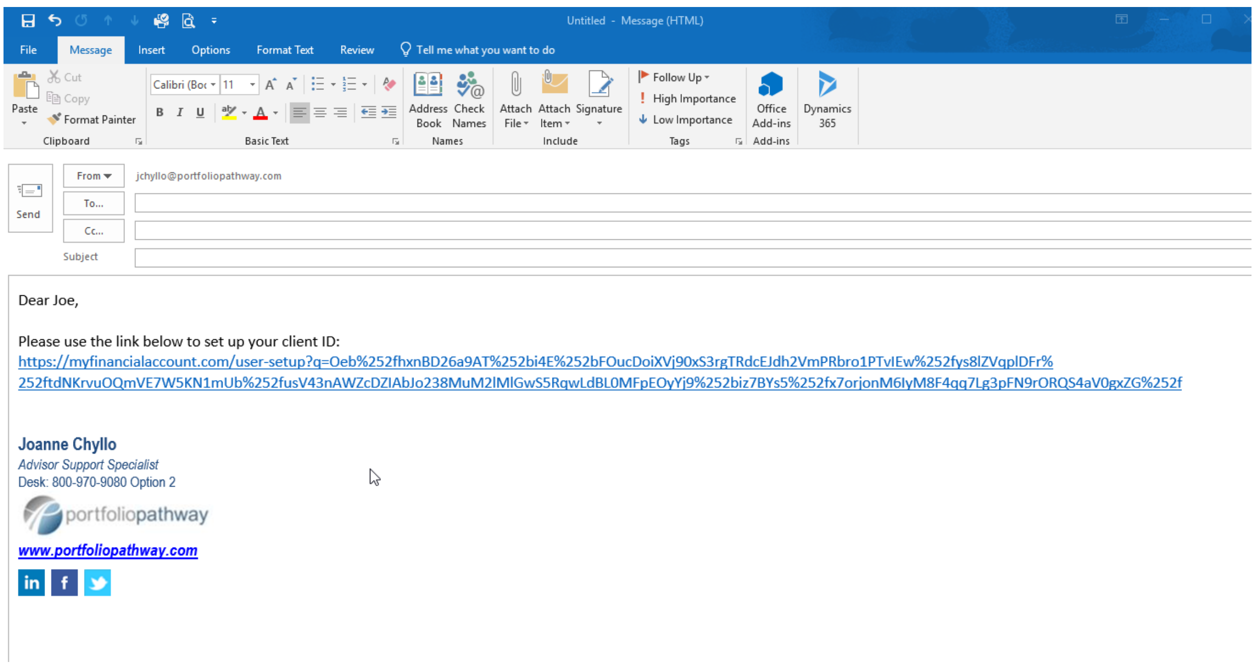
This will bring you to the Initiate Client ID setup screen. Complete the areas highlighted below. You will need to ensure you have the proper email address and the name of the household in Portfolio Pathway they are associated with in order to completed this step.



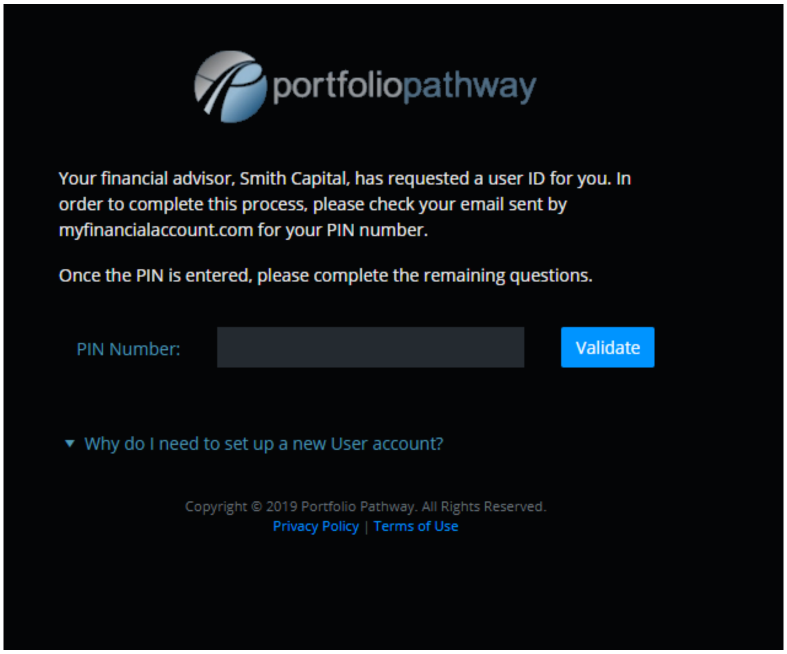
Once completed you can either choose to copy the email to the clipboard and paste it into Outlook or you can Launch the email directly into the email application being utilized.   Please note that an email address cannot be utilized more than once. You will receive an error message if it is already in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



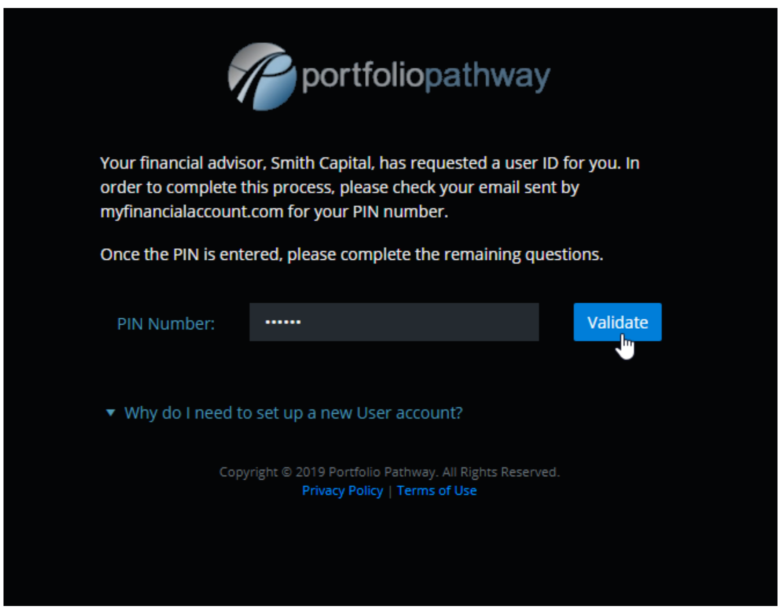
The email will look similar to the one below:



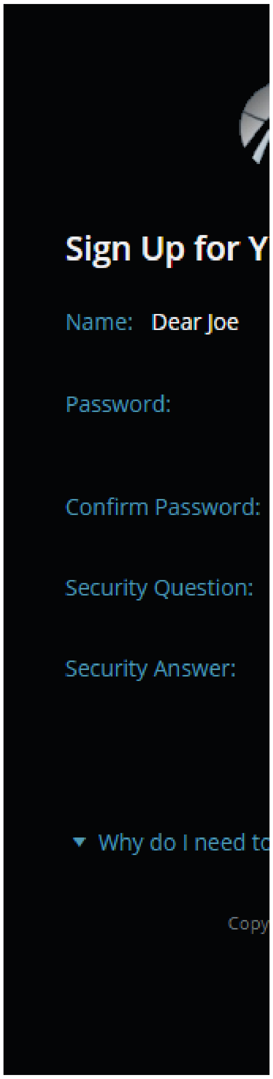
Once the client clicks on the email link provided in the email Portfolio Pathway's system will automatically generate another email to that individual that will provide a unique PIN number that will need to be used to complete the validation.

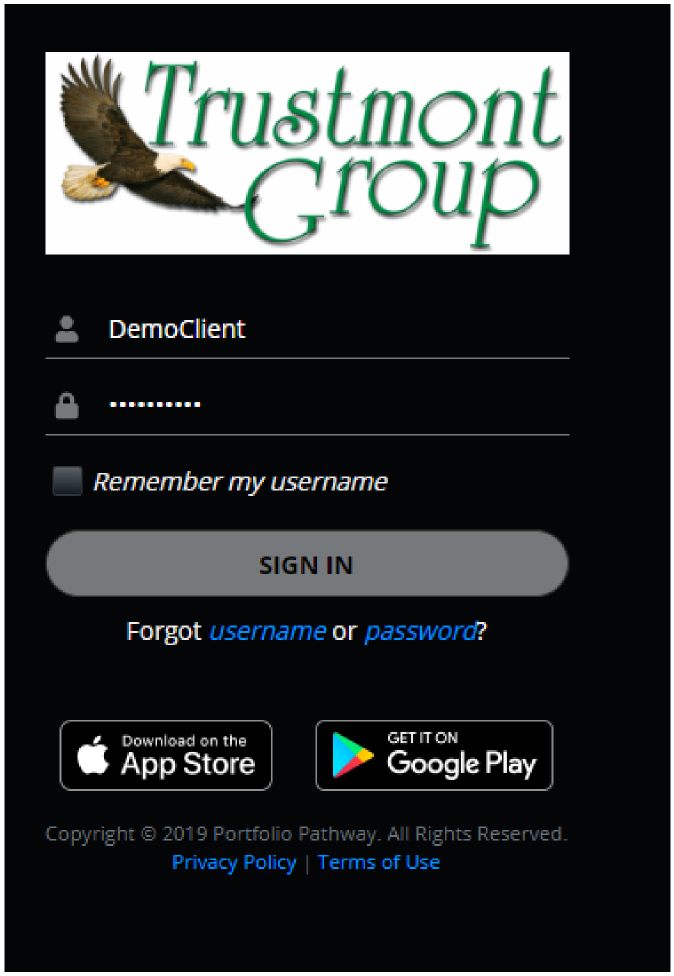


They will need to enter the PIN number provided in that email and hit Validate



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.





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