AdvisorClient®

Gain online access to your account

Now that your account is open, you can view and manage your account online

1

Visit:
www.advisorclient.com/getstarted.

2

Get started

Click "Get Started." If your advisor provided you with a User ID, enter it here and then choose the validation method (phone or text/SMS). If you don't have a User ID, please enter your account number and follow the on-screen prompts.

3

A security code will be generated and provided to you via Phone or Text/SMS based on your choice in the previous step. Enter the Security Code where indicated.

Continue to step 4

4

If you entered your account number in Step 2, you'll now be able to create your unique User ID and password. If you entered a User ID provided by your advisor, you'll be prompted to enter a new password to continue.

5

If you're not already set up to receive communications electronically, you'll be prompted to subscribe to electronic communications here. Enter your email address and continue.

6

You're now logged in to AdvisorClient.com!

Once you complete this brief setup process, you will be able to view your account balances, positions, transaction history, statements, tax documents, and more.

Try the new AdvisorClient® now ▶

Once you're logged in to AdvisorClient.com, click the "**Try the new AdvisorClient now**" image to see the new site.

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