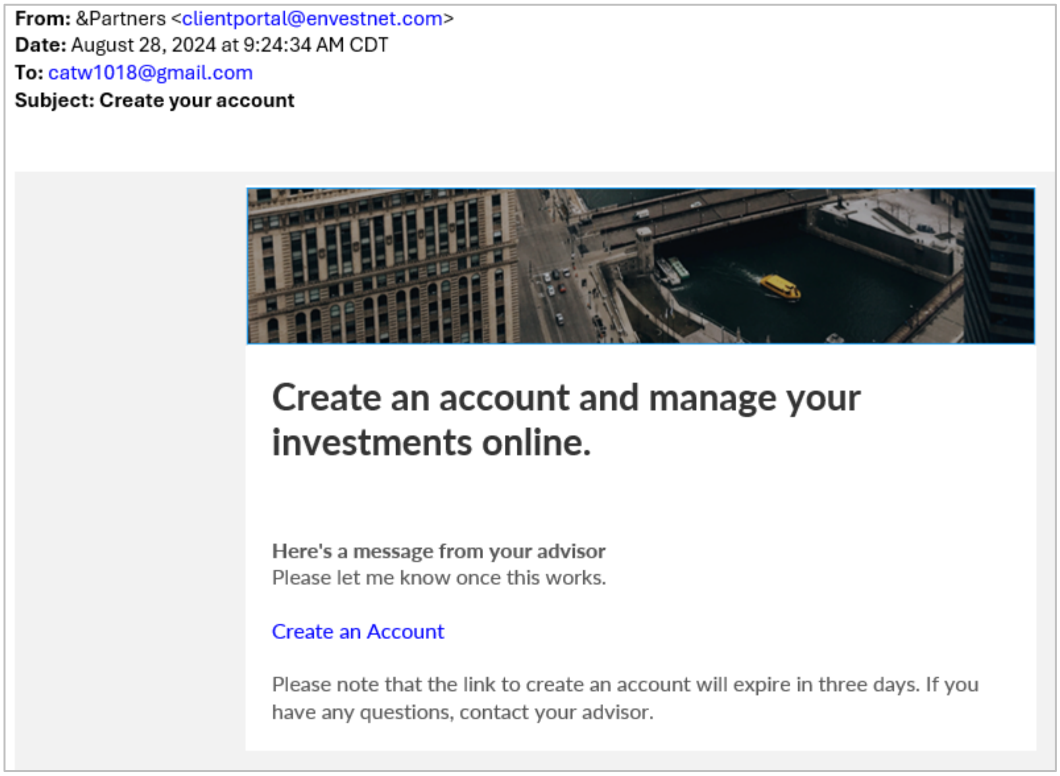
Logging into the Client Portal

1. Your advisor generates an email from his/her Envestnet platform.
2. You'll receive an email and click **Create an Account**.



From: &Partners <clientportal@envestnet.com>
Date: August 28, 2024 at 9:24:34 AM CDT
To: catw1018@gmail.com
Subject: Create your account

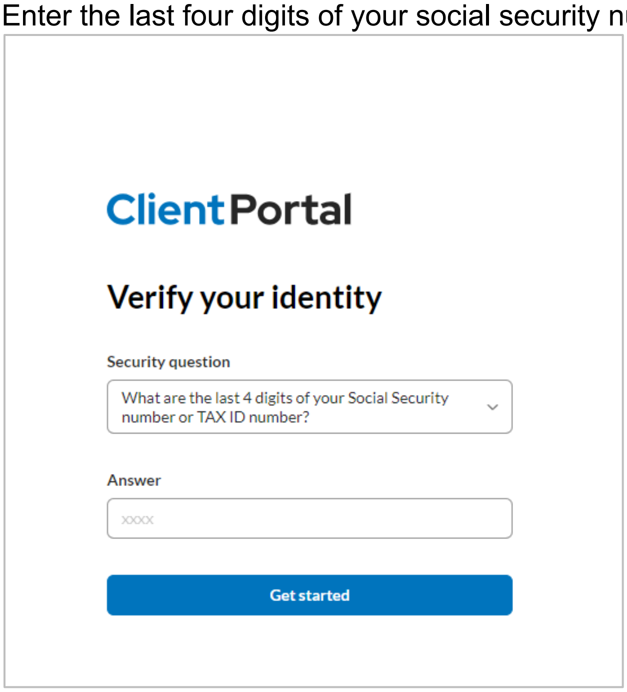
Create an account and manage your investments online.

Here's a message from your advisor
Please let me know once this works.

Create an Account

Please note that the link to create an account will expire in three days. If you have any questions, contact your advisor.

3. Enter the last four digits of your social security number.



4. Create a username and password that meets the system requirements.
5. You may now begin using Client Portal.