Logging into the Client Portal

1. Your advisor generates an email from their 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:
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.

ClientPortal

Verify your identity

Security question

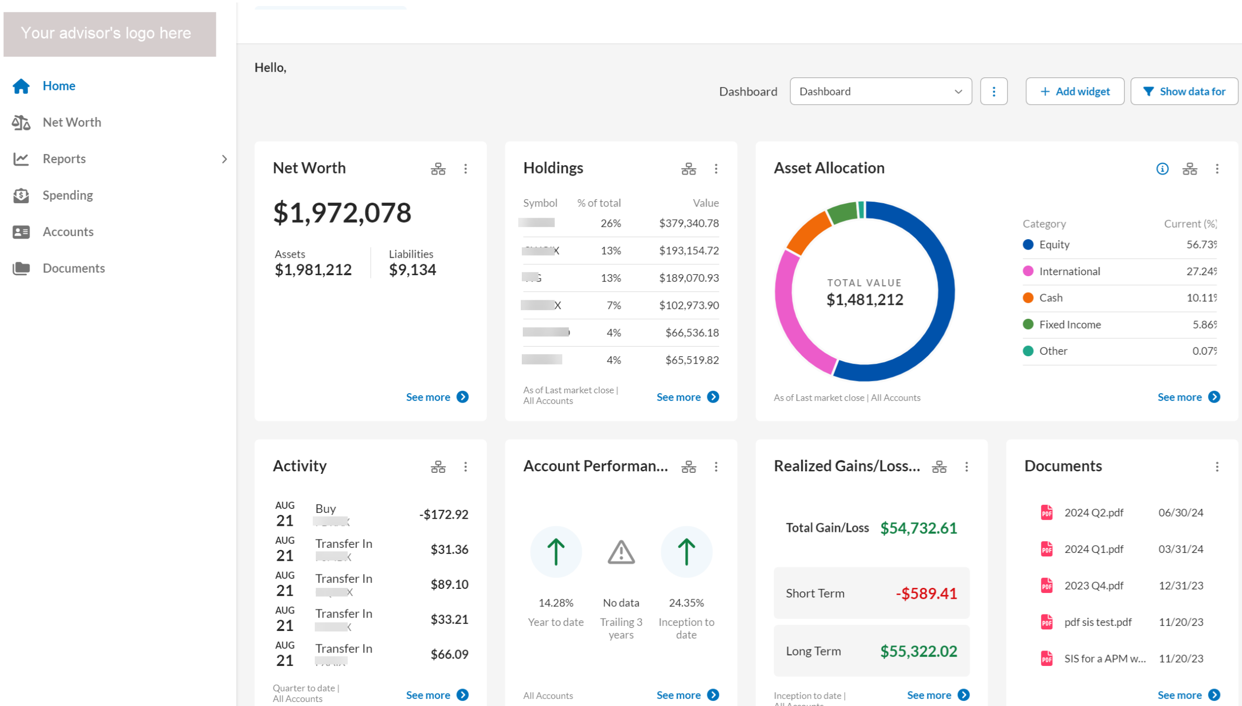
What are the last 4 digits of your Social Security number or TAX ID number?

Answer

xxxx

Get started

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



- To access the Envestnet Client Portal in the future, visit your advisor's website and select **Client Login**. This will provide a link to the [Envestnet Client Portal](#).
- If you are using the mobile app for the Envestnet Client Portal, please use the portal code **envoberon**.

  Image of mobile app in library: