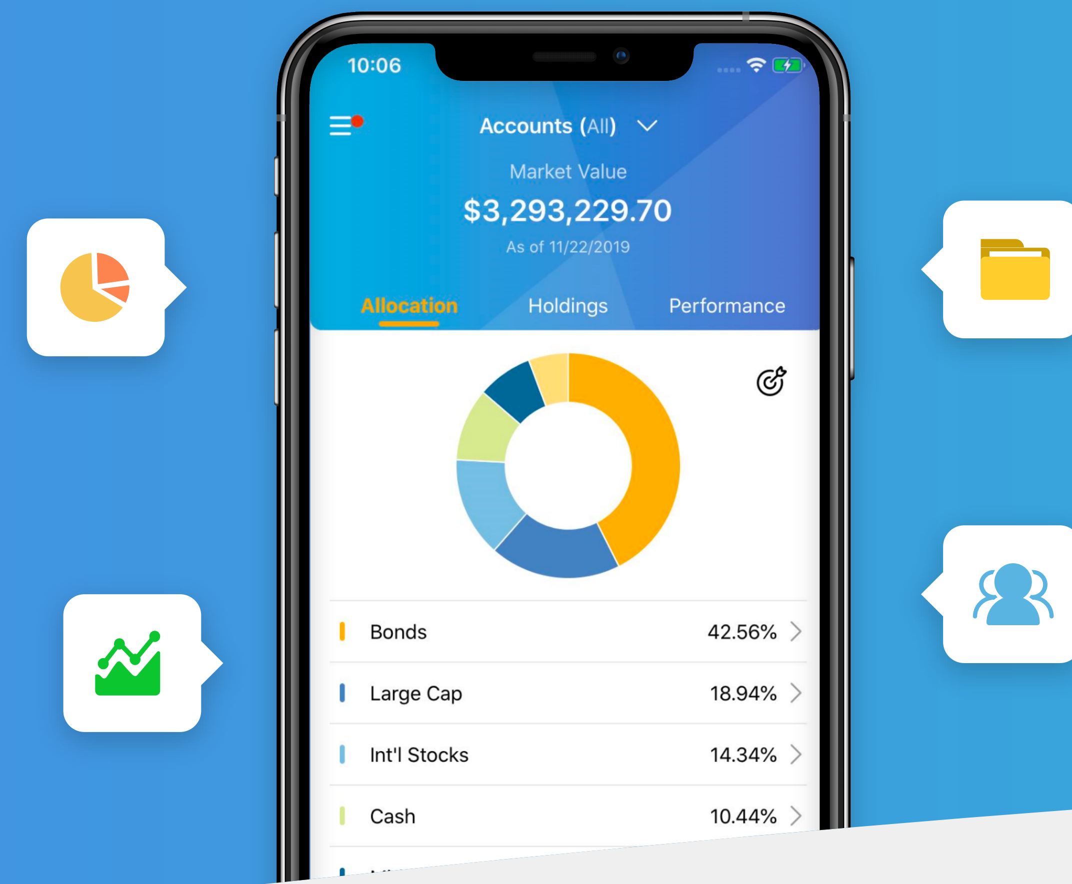
myAdvisorLink



View your portfolio and stay connected right from your mobile device!

myAdvisorLink is a user-friendly mobile app that allows you to take your Client Portal with you on-the-go. You can monitor your portfolio as well as view and upload documents in your Vault.

Download on the App Store

GET IT ON Google Play

Step 1

Downloading the App

To download the app, head to the App Store or Google Play Store and search for "myAdvisorLink". Download the app to your device as instructed.

Step 2

Logging In

Log into the app with your Web Portal Username and Password. The ability to login using Face or Touch ID is availiable depending on your device. If you do not know your login credentials, please contact your financial advisor.

Step 3

Accessing Your Account

View your household Net Worth breakdown with the ability to drill down to an individual account. By account, you can access allocation, holdings and performance information. Quickly access the Vault to view reports and documents on-the-go.