

# AdvisorClient<sup>®</sup>

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](http://www.advisorclient.com/getstarted).



2



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<sup>®</sup>**  
now ►

Once you’re logged in to AdvisorClient.com, click the “**Try the new AdvisorClient now**” image to see the new site.