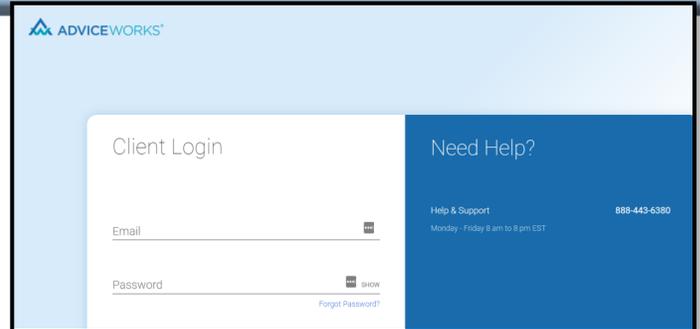


1. Log In

Go to client.adviceworks.net and enter your email and password.

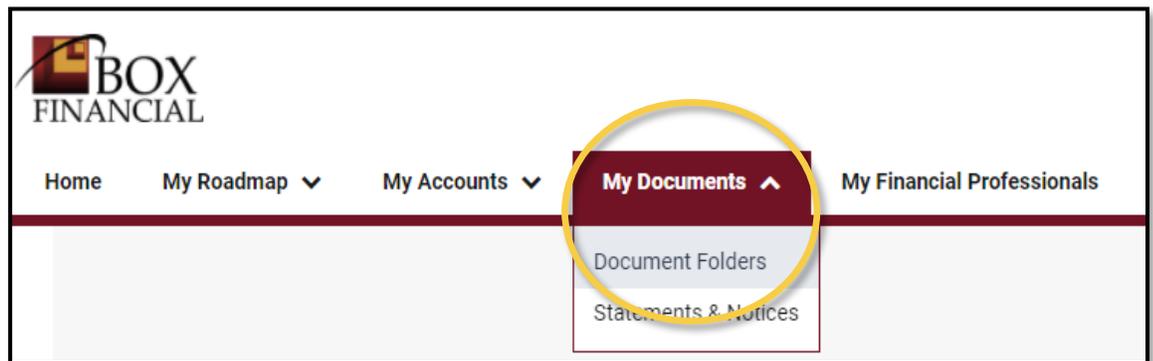
Then a verification code will be sent to your phone, which you will need to enter.



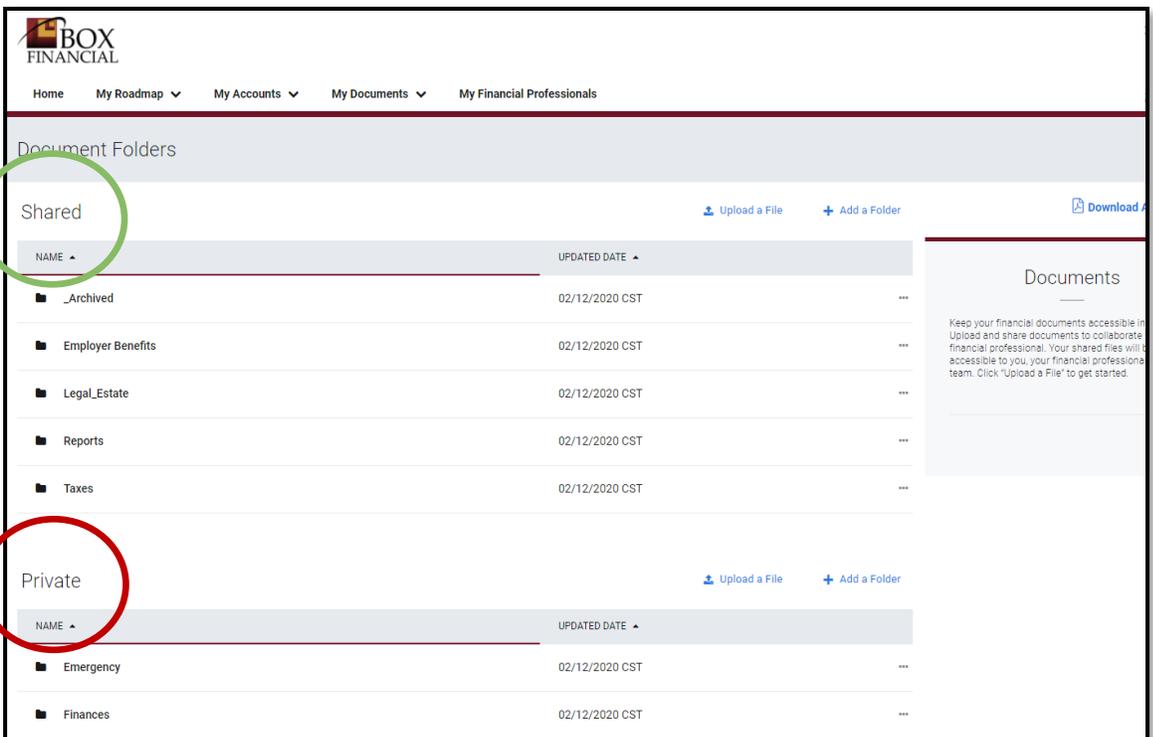
2. Sharing

Go to the **My Documents** tab at the top navigation bar and select the **Document Folders** option.

Here you can upload documents to share with your advisor team or download documents that your team shares with you.

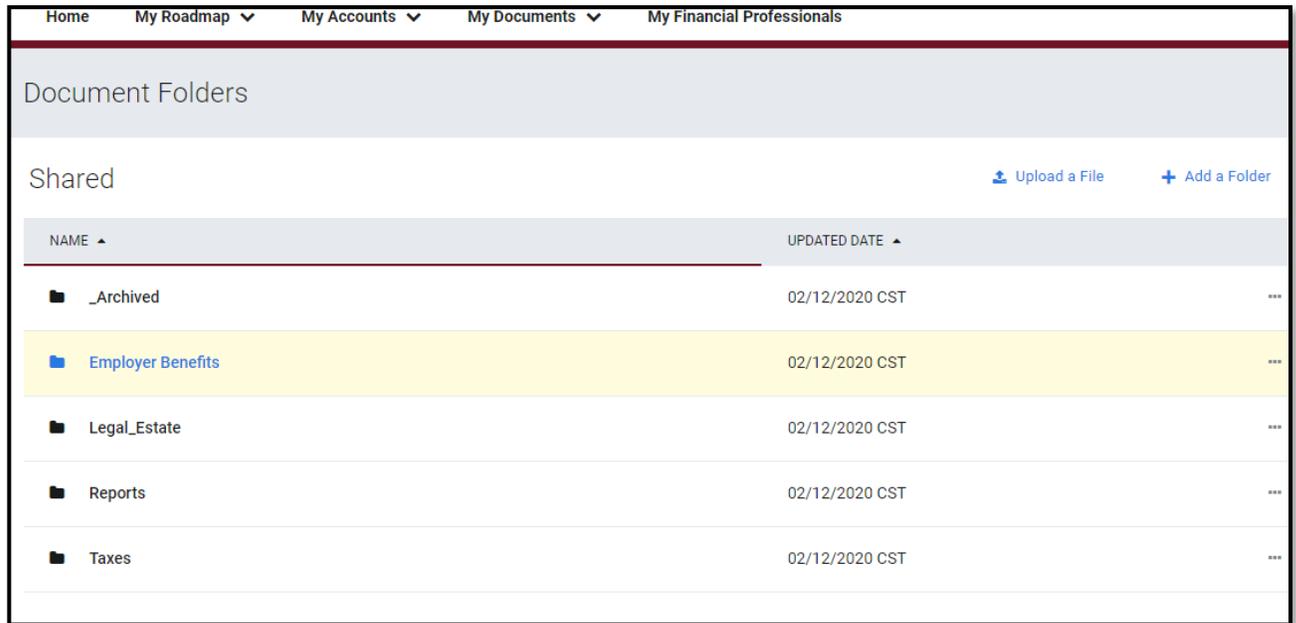


Make sure you are uploading them to the **Shared** document section.

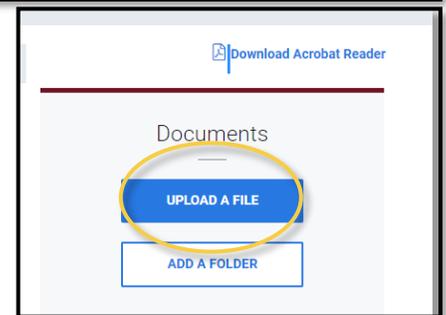


The **Private** document section is where you can upload documents you want to keep private from your advisor team.

To upload a document to a specific folder, click on the folder where you want to upload the file.

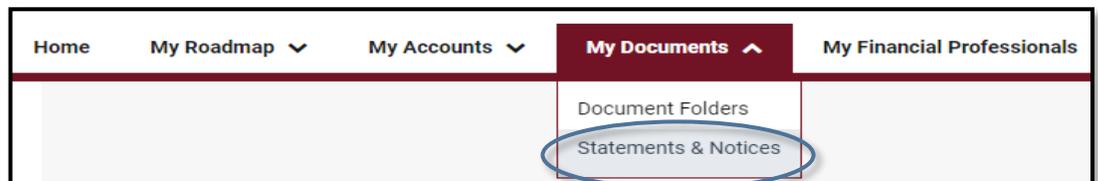


Then select the **Upload a File** button. Here you can select the file you want to upload.

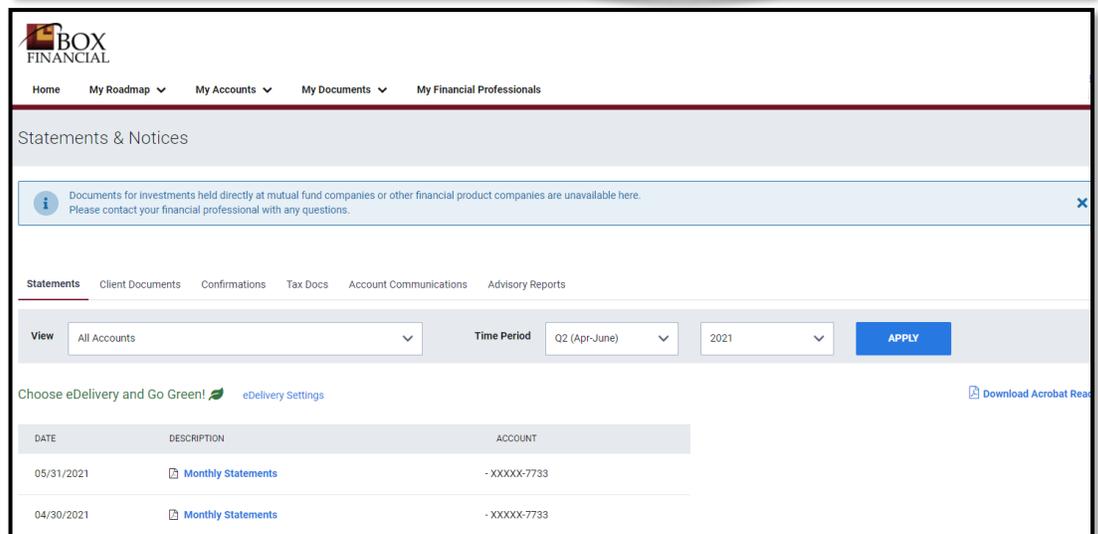


3. Access

Go to the **My Docs** tab at the top navigation bar and select the **Statements and Notices** option.



Here you will have access to statements and notices regarding select accounts managed by Box Financial Advisors.



4. Living Balance Sheet

To view a summary of your Living Balance Sheet, you can click on **All Accounts** under the **My Accounts** tab at the top navigation bar.

Home My Roadmap **My Accounts** My Documents My Financial Professionals 612-321-4567

My Accounts

Account Valuation Information: Value reflect investments for the date and time shown. Recent account activity in your accounts may take one to two additional days to update and accurately reflect the true account value. For the the most current your Financial Professional.

TOTAL NET WORTH* **\$100,000,000.00**

ACCOUNT NICKNAME	ACCOUNT NAME	ACCOUNT #	Update As Of	VALUE
John and Jennifer JT	Prime Portfolio Services JOINT WITH SURVIVORSHIP	XXXXX-4409	06/29/2021	\$1,850,000.00
John Roth IRA	IRA-ROTH	XXXXX-5484	06/29/2021	\$150,000.00

Authorized Accounts

ACCOUNT NICKNAME, ACCOUNT OWNER	ACCOUNT NAME	ACCOUNT #	Update As Of	VALUE
Smith Advisors Inc	CORPORATION	XXXXX-8246	06/29/2021	\$1,750,000.00

Linked Assets & Liabilities** **\$96,250,000.00**

View Linked Account Details Manage Linked Accounts Link Accounts

ASSET/LIABILITY	ACCOUNT #	Update As Of	VALUE
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Under the **My Accounts** tab at the top navigation bar, you will also be able to **link** accounts from other institutions.

Linked Assets & Liabilities** [View Linked Account Details](#) [Manage Linked Accounts](#) [Link Accounts](#)

This will give your Box Financial Advisors team access to all of your current account information to ensure your financial planning reports are as accurate as possible.

If you have any technical issues with the website, call AdviceWorks tech support at 888-443-6380. If you have any navigational issues or questions with the site, call your financial advisor team or our main number at 612-347-7809.

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