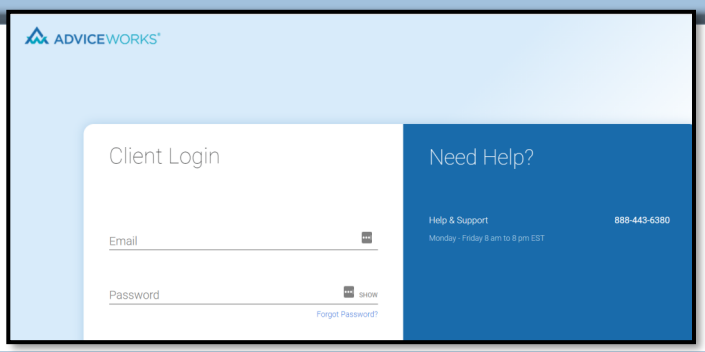
Getting Started with ADVICEWORKS™

1. Log In

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

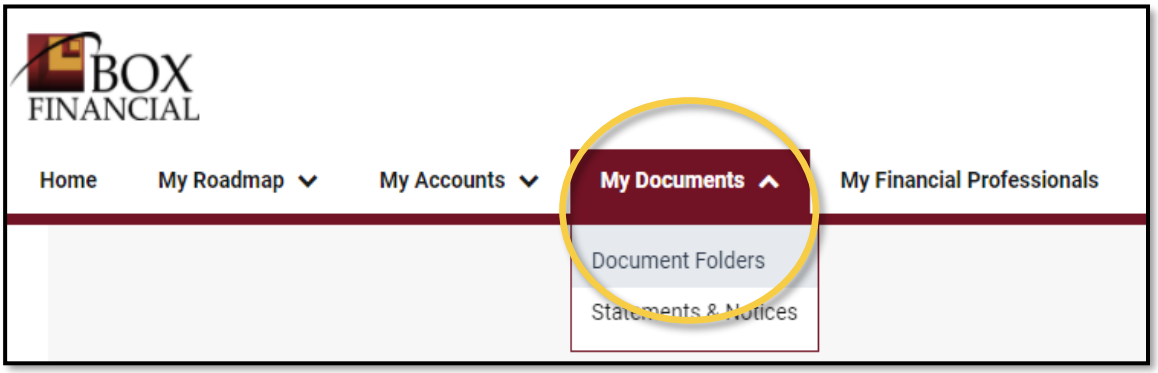
Then a verification code will be sent to your phone, which you will need to enter.



2. Sharing

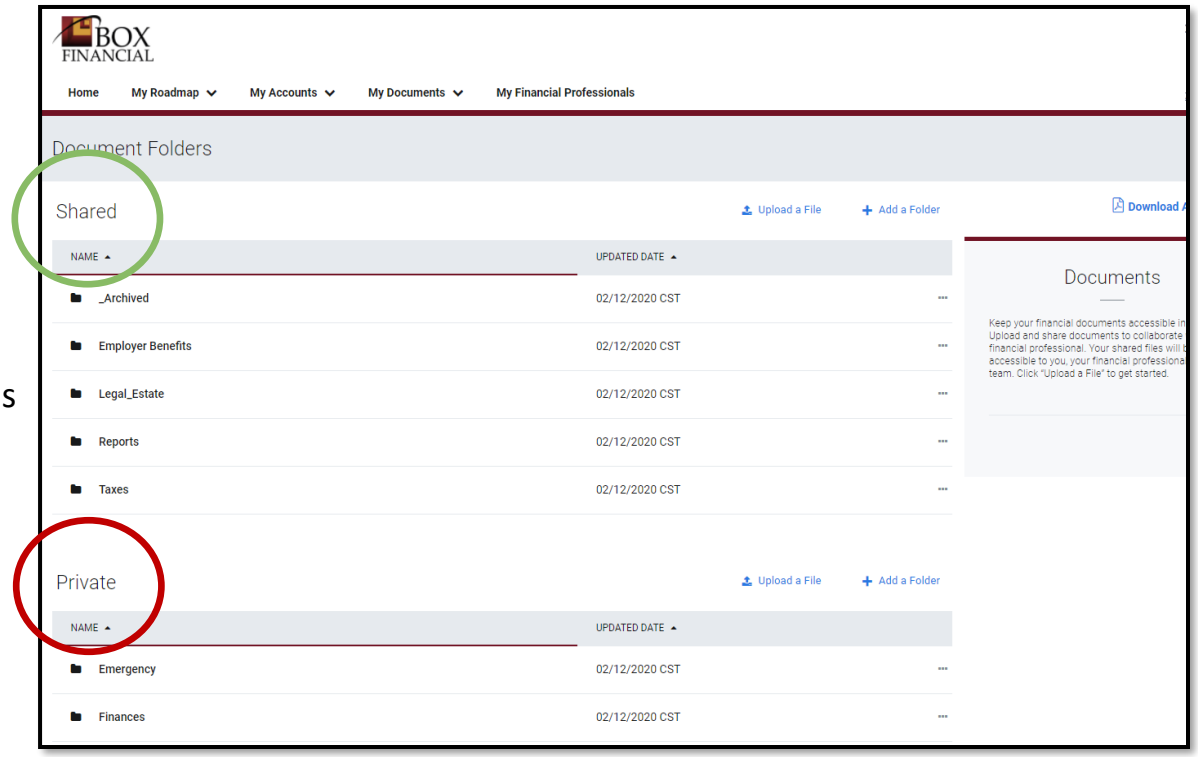
Go to the **My Documents** tab at the top navigation bar and select the **Document Folders** option.

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

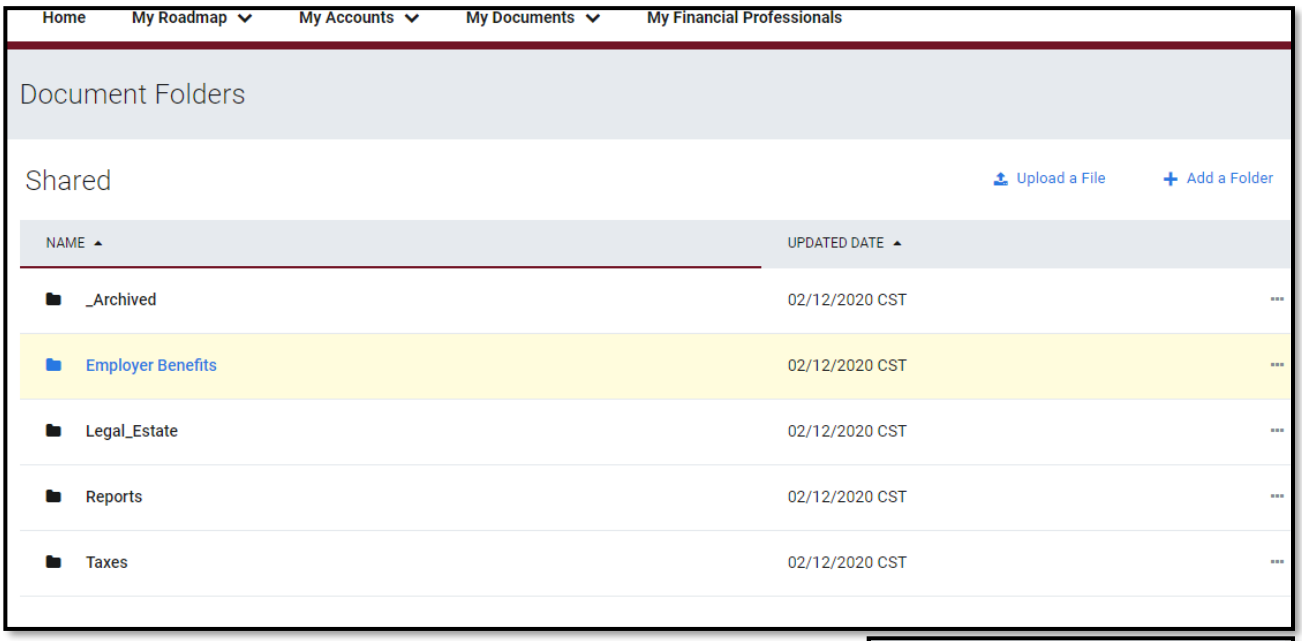


Make sure you are uploading them to the **Shared** document section.

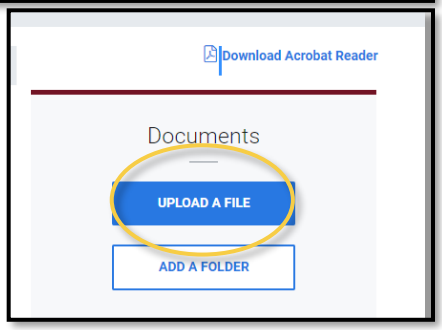
The **Private** document section is where you can upload documents you want to keep private from your advisor team.



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

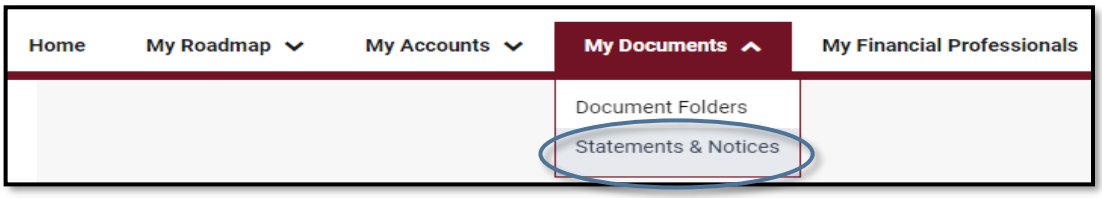


Then select the **Upload a File** button. Here you can select the file you want to upload.

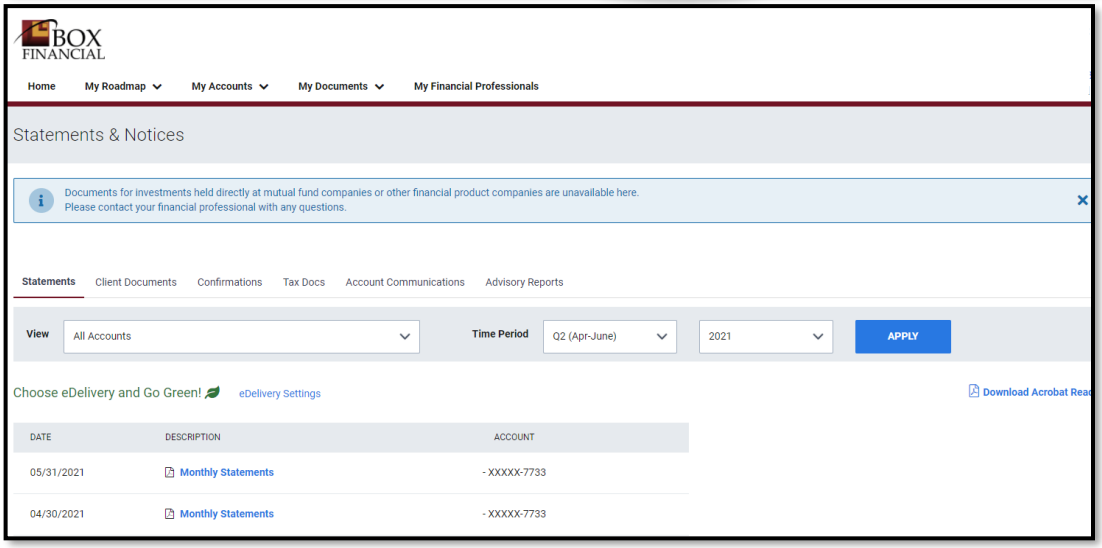


3. Access

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

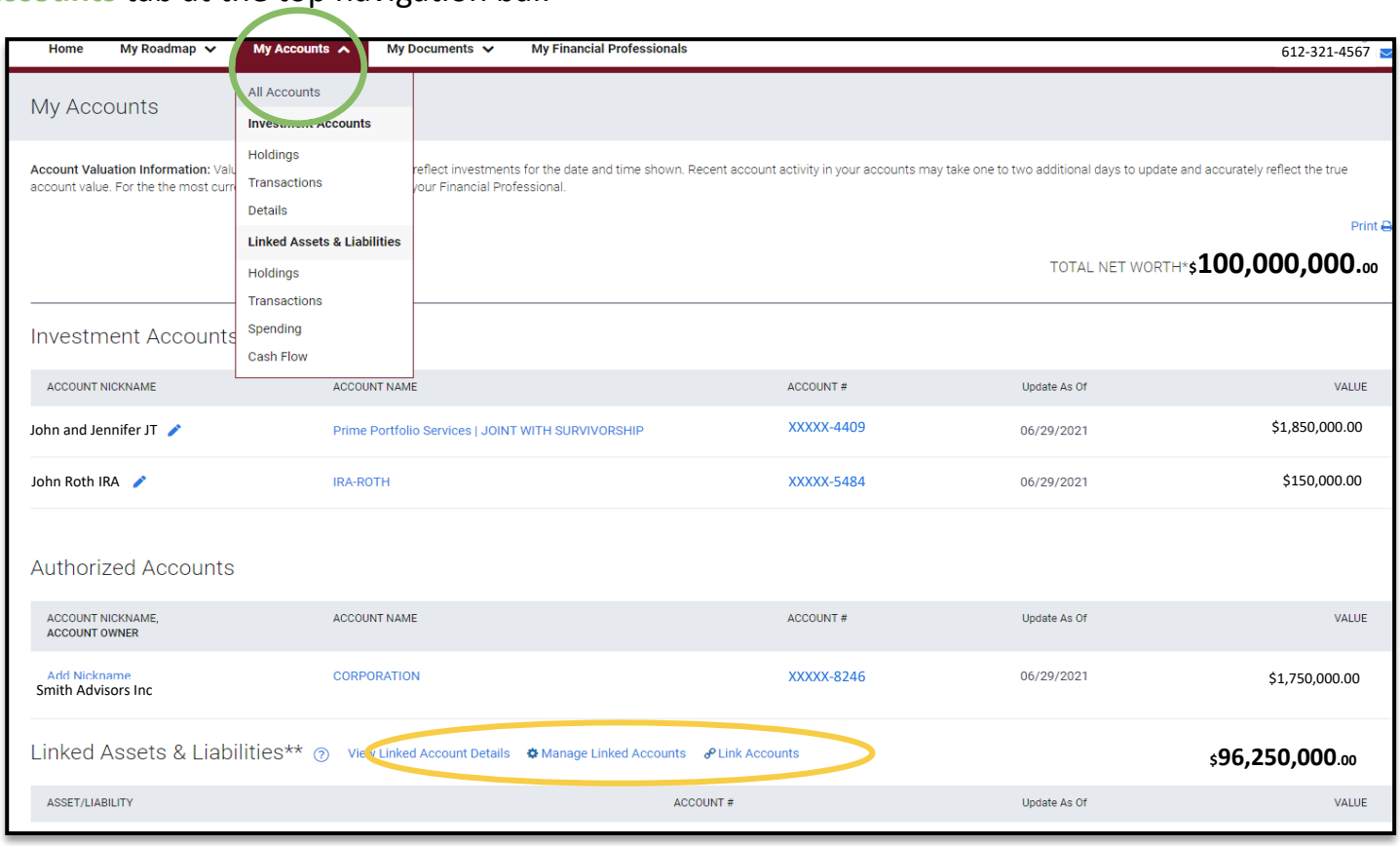


Here you will have access to statements and notices regarding select accounts managed by Box Financial Advisors.

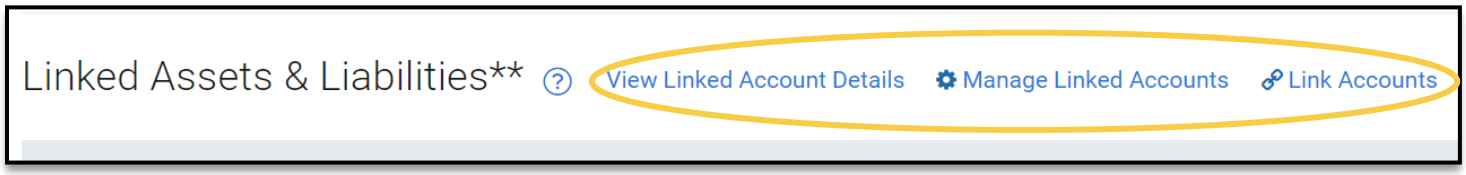


4. Living Balance Sheet

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.



Under the **My Accounts** tab at the top navigation bar, you will also be able to **link** accounts from other institutions.



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.