**Landmark Financial Services**

**All Investment Accounts**

**(Brokerage, College, Annuity, 3rd party mgmt.)**

**On-Line Account Access**

**How to get registered:**

* Log on to website https://www3.mainaccount.com/can/ (yes, that 3 is suppose to be there after www and before the .mainaccount).
* Click on **registration** button.
* Follow prompts (you will just need your **SSN** and temporary password **“LANDMARK”).**
* Once registered, we will receive an email to set your account up; once that is completed you will receive an email back with instructions on how to log in.

**How to log in:**

* Log in to website www3.mainaccount.com/can/.
* **PLEASE** bookmark this website for easy access in the future.
* Use the “**Landmark Financial Client Review”** report from the ***Portfolio*** dropdown menu.
* To see all of your accounts on one report use the **“*Last Name* All Accounts”** option from the ***Report*** dropdown menu.
* You can also change the time period to check out different **“Performance Time Periods”** from the ***Time Period*** dropdown menu.

**What you’re looking at:**

* The **Landmark Financial Client Review** report will contain the following:
  + **Portfolio Summary:** showing you a quick view of your combined account balance and performance for the time period selected
  + **Portfolio Value and Benchmark:** shows your account vs. two benchmarks
  + **Holdings by net worth:** showing you balance of each individual account as of end of previous business day
  + **Asset Allocation:** shows you the percentage of assets in different asset classes
  + **Multi Period Performance:**  Shows various time frame performance returns for each of your accounts
  + **Historical Performance:**  Shows individual fund performance inside each account
  + **Gain/Loss by Investor:**  Shows the actual dollar amount associated to the above percentages by fund and by account

**If all the information is overwhelming, I would focus on the first two reports listed. These should provide all the basic info you’ll need.**