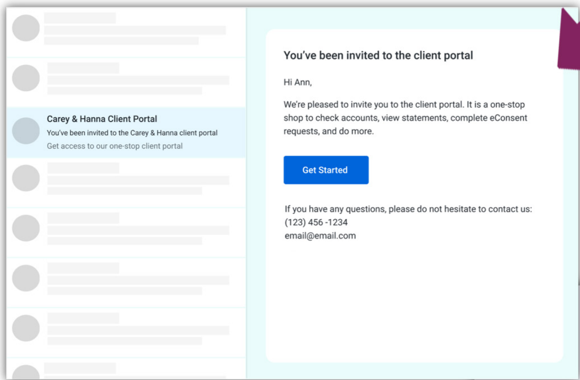
You're Only Three Steps Away From Your New Client Portal

Your new self-service client portal is here. The client portal is a place for you to check your account balances, access brokerage account statements, and much more. It's easy to log in and manage your account and if you forget your password, you can reset it yourself. It's easy to begin, once you receive an email from me inviting you to the portal you just need to follow the steps below:

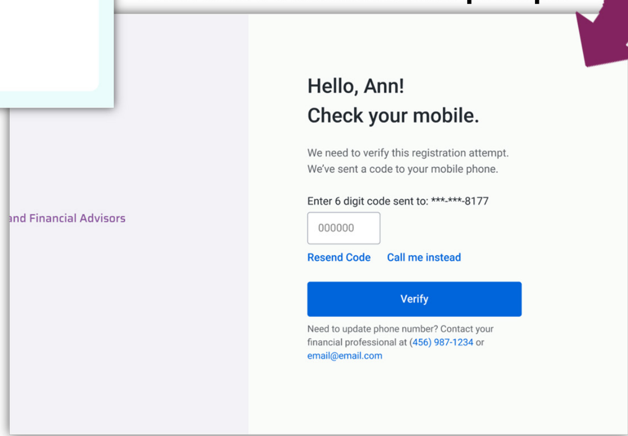
Step 1

Open your email from me and click on "Get Started"



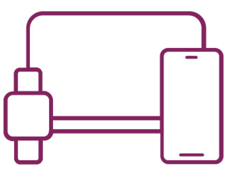
Step 2

Follow the authentication prompts



Step 3

Enjoy your access



Account Access from any Smart Device

Quarterly Performance Reports

Brokerage Account Statements

And More...

Avantax®