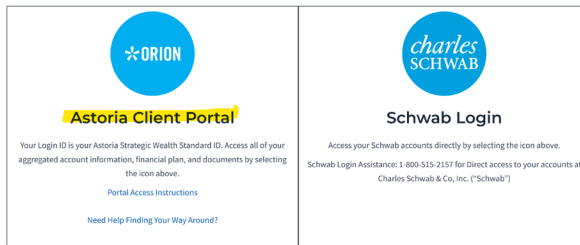
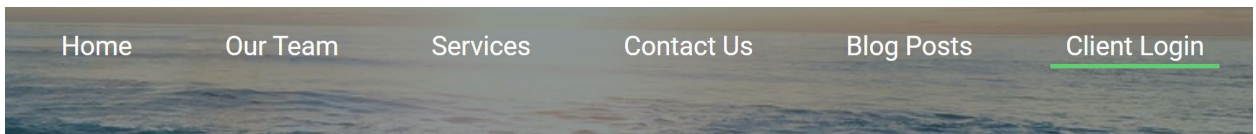




Accessing your Client Portal: Recall that our portal, released in 2018, provides **single sign-on** access to your *financial plan and live net worth updates (MoneyGuidePro), Sharefile (your document vault), quarterly reports from our firm, statements and tax documents from TD Ameritrade, as well as account activity, holdings, performance, etc.*

To Access your Client Portal

- Click on the **Client Portal** link from our [website](#):



- Your **Login ID** is your ASW Standard Login typically in the format of <lastname>.<firstname>. As an example, a couple with the names of Jake and Stephanie Lakeland would have logins: Lakeland.jake and Lakeland.stephanie (Note: Your login ID is **NOT** your email address).
- Your **password is your standard password with us unless you have changed it.** If you have forgotten your password or are having trouble logging in, please reach out to any of us.



Login

Username

Continue