

How to Set Up & Login to Your eMoney Portal

Follow these steps to activate your portal, create your login, and securely access your financial information.

1 Open Your Invitation Email

Activate Your Client Portal

Frank Miller (TEST).

Shari Seidman on behalf of Astoria Strategic Wealth has sent you a one-time link to register.

Gain access to your Client Portal, a secure and convenient place to view your financial information. With aggregation, you can bring your accounts together so you can see all your finances in one place, making it easier to stay organized and informed.

To get started, please register using the link below.

[Get started now](#)

This secure link will expire in seven days, so we encourage you to complete it soon to take full advantage of your Client Portal. If the link expires before you finish, contact your financial representative to request a new one.



Look for an email with the subject **"Activate Your Client Portal"** from Astoria Strategic Wealth. Click **Get started now** to begin.

2 Create Your Username and Password



Choose a username and password to access your website.

[Register](#)

[Need help?](#)

Password requirements:

- ☐ Contains at least 14 characters.
- ☐ Contains lowercase letters.
- ☐ Contains uppercase letters.
- ☐ Contains numbers.
- ☐ Contains special characters.
- ☐ Does not contain username, first name, or last name.

Choose a username and create a password that meets the requirements shown on the screen. Then click **Register**.

3 Set Up Security Methods



Set up security methods

@ FrankMiller123123

Security methods help protect your eMoney Authentication account by ensuring only you have access.

Required now



Phone
Verify with a text or phone call

[Set up](#)

[Back to Sign In](#)

[Need help?](#)

You will be prompted to set up at least one security method. Click **Set up** next to Phone to verify with a text or call.

4 Verify Your Phone



Set up phone authentication

@ FrankMiller123123

Enter your phone number to receive a verification code via SMS.

☒ SMS

☐ Voice call

Country/region

United States

Phone number

+1

[Receive a code via SMS](#)

[Return to authenticator list](#)

Enter your phone number and choose **SMS** or **Voice call**. Click **Receive a code via SMS** to get your verification code.

5 Enter the Code



Enter verification code

@ FrankMiller123123

We sent a verification code to
(...)-...-1234

Verification code

1

2

3

4

5

6

[Send a new code](#)

[Verify code](#)

Enter the code you received by text and click **Verify code**.

6 You're All Set!



[Help](#) [Settings](#) [Sign Out](#)

[Home](#) [Organizer](#) [Investments](#) [Reports](#) [My Advisor](#)

Welcome
Frank and Joanna Miller (TEST)

[Customize](#)

INVESTMENTS

\$1,140,312
as of today

\$34,756
↑ this month

\$165,649
↑ year to date



You will be logged in to your eMoney Client Portal and can now view your financial information.

Bookmark this page for easy access!



Need Help?

If you have any questions or need assistance at any time, please reach out to our team. We're here to help!

