AdvisorClient®

Gain online access to your account

Now that your account is open, you can view and manage your account online

1

Visit: www.advisorclient.com/getstarted.

2

Get started

Click “Get Started.” Please enter your account number and follow the on-screen prompts. You can find this number on any of your statements or contact us at 800.871.1219 or melinda@scarletoakfs.com.

3

A security code will be generated and provided to you via Phone or Text/SMS based on your choice in the previous step. Enter the Security Code where indicated.

Continue to step 4

4

If you entered your account number in Step 2, you’ll now be able to create your unique User ID and password. If you entered a User ID provided by your advisor, you’ll be prompted to enter a new password to continue.

5

If you’re not already set up to receive communications electronically, you’ll be prompted to subscribe to electronic communications here. Enter your email address and continue.

6

You’re now logged in to AdvisorClient.com!

Once you complete this brief setup process, you will be able to view your account balances, positions, transaction history, statements, tax documents, and more.

Setting up your AdvisorClient Log-in will help with the smooth transition to Charles Schwab over the next 18 months.

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