



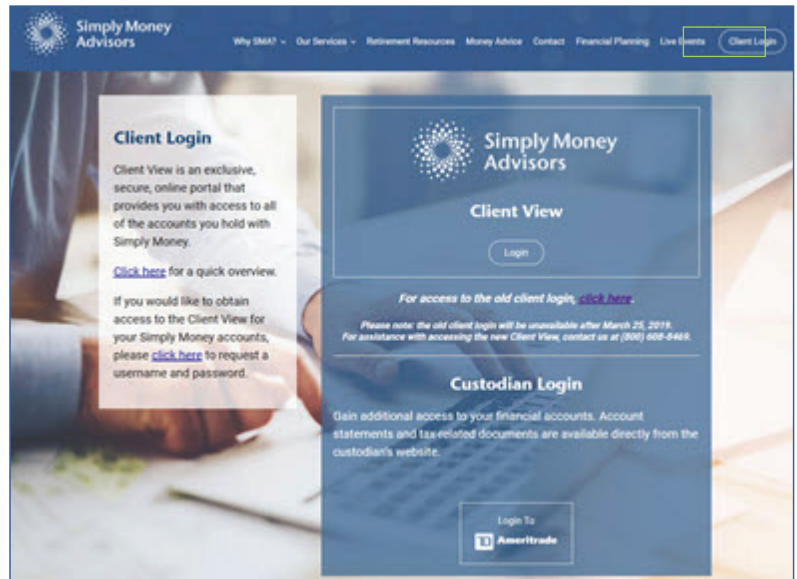
# Simply Money Advisors

## Accessing Your Accounts

As a Simply Money Advisors client, you have direct access to your account information through the *Client View* portal.

Access *Client View* on SimplyMoneyAdvisors.com by clicking the **Client Login** link on the top right menu. If accessing from a mobile device, it will be the second link on the mobile drop-down menu.

From this page you not only have access to *Client View*, but links to external custodian and investment websites.

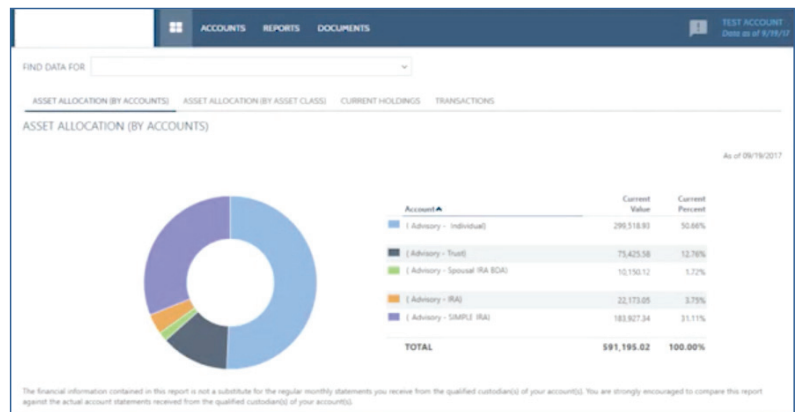


## Client View Dashboard

Once you login, the dashboard will be the first thing you see. The dashboard provides you with 24/7 secure access to your accounts with a consolidated summary of your accounts.

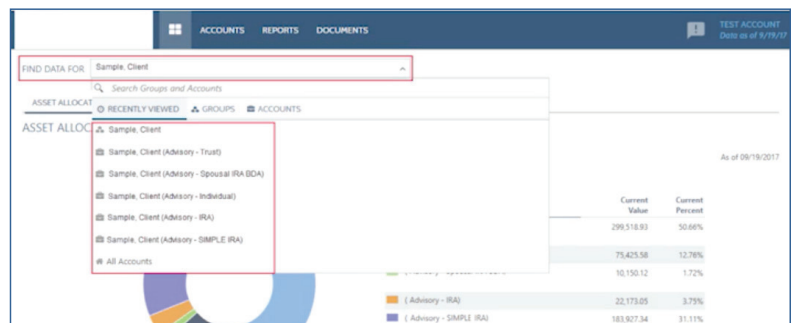
You will be able to view:

- Asset Allocation by Accounts
- Asset Allocation by Asset Class
- Underlying holdings and transactions



## Viewing Individual Accounts

To view each account individually simply use the pull down menu at the top to select All Accounts or a single account.



Questions? Call 800.608.8469 or email [service@simplymoneyadvisors.com](mailto:service@simplymoneyadvisors.com)

Simply Money Advisors is an Investment Advisor registered with the Securities and Exchange Commission.