Bookmark to an iPhone or iPad

This training guide will demonstrate how to add your financial portal access as a bookmark on your smartphone or device.

1. Open the Safari browser.



2. Enter in your log-in URL which can be referenced from your original registration confirmation email or provided by your advisor.



Bookmark to an iPhone or iPad

3. Click the highlighted icon below.

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4. Choose to Add to Home Screen.

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Bookmark to an iPhone or iPad

5. Customize the App Name & Click Add



6. Access your website!

