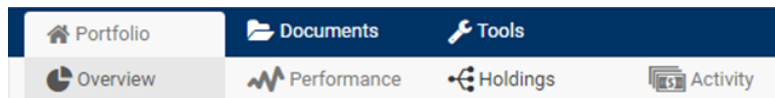
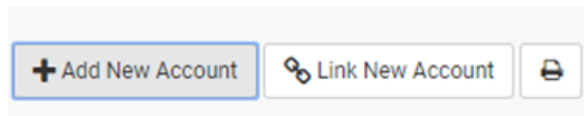


## How to access accounts with one or more custodians on Claraphi and [link accounts with other financial institutions](#):

Claraphi offers investors the ability to view accounts held through multiple custodians. This is beneficial for investors who want a consolidated view of their assets. In order to access your account online, your financial professional will need to assign you a username and either send you a temporary password or provide you with a link to create your unique password. *(Please note that the link will expire in 15 minutes if not activated.)*



The *Portfolio* tab provides a graphical overview of your account; you can click on the graphic for a drill-down view of holdings. The *Performance* tab enables you to monitor the performance of your investments over different time periods. The *Holdings* tab shows the individual investments in your account. If you have multiple accounts, you can click on the account title to see the holdings in each account. The *Activity* tab shows market value changes, income and distributions. Use the *Documents* tab to download and print statements and tax documents. The *Tools* tab enables you to create a personal balance sheet of your assets and liabilities. Click on *Add New Account* to input assets such as property, vehicles, cash or artwork, etc., or to input debts/liabilities. You can add categories as needed. Click on *Link New Account* to automatically link and dynamically update from other financial institutions.



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Claraphi Advisory Network LLC is an SEC Registered Investment Advisor

## Investors: Here's How to Access Your Account Information



Claraphi makes it easy and convenient for you to access information online about your investment account(s).



### Use your Personal Computer, Tablet or Smartphone to:

- \* Review transactions in your account(s)
- \* View securities and cash balances
- \* Access account statements and tax documents
- \* Link accounts from other financial institutions



## Investors: Stay Informed!

You'll have peace of mind knowing you can access information about your investments easily and conveniently, online.



## Your assets are held with one or more custodians.

Claraphi uses several custodians to hold client assets: Fidelity, Schwab, Folio Institutional, and Kingdom Trust (among others). Each custodian provides secure access to client account information through a unique and separate log-in.

Some clients may have assets with more than one of the above referenced custodians. You may log in and view your account balances and activity through the custodian's website or you may choose to access your account activity through the Claraphi website at [www.claraphi.com](http://www.claraphi.com). If you have a smartphone or tablet, you can access the Claraphi App through the Google Play store or through the iTunes store.

For your convenience, you can use this link <http://www.claraphiclients.com/account-login.html> to access an automatic link to each of the custodians' websites.



Visit [www.fidelity.com](http://www.fidelity.com)

Click on LOG IN and enter your username and password

When your account is opened, you will have to register for online account access. You will need to provide your name, date of birth and your social security number or tax identification number that you used to open your account with Claraphi. If you have forgotten your user name and/or password, you can click on the "NEED HELP" link.

[Reset Your Username or Password](#)



Visit [www.folioclient.com](http://www.folioclient.com)

Click on LOG IN and enter your username

When your account is opened, Claraphi will provide your investment professional a username for your account(s). Folio will send an email to you with a registration link that you must use to register/access your account(s). You will need to enter your user name (*your investment professional can provide this to you*), your date of birth, and the last four digits of your social security number.

For your added protection, Folio will also require you to provide *Second Factor Identification* within 30 days of registering your account. All you need is a phone, or the Google Authenticator app (available on iPhone or Android and other devices). Folio can send you a text message authentication code, or call you with one, or you can use the Google Authenticator app authentication code to login. *You can also view alternative investments held with Kingdom Trust through your Folio account.*



Visit [www.schwab.com](http://www.schwab.com)

Click on LOG IN and enter your username and password

[| First Time Users](#)

When your account is opened, you will have to register for online account access by clicking on the *First Time Users* link. You will need to provide your brokerage account number, date of birth, your telephone number and social security number or tax identification number that you used to open your account with Claraphi.