Step-by-Step Guide: Creating a Password for your Client Portal

Why would I use the Client Portal?

- **Quarterly Status Reports**: You can access & download your Quarterly Status Reports so you can see how any changes you've requested and the latest market movements have impacted your Comfort Zone™ and performance. You will receive an email from me each quarter when a new one is posted.

- **Secure Document Sharing**: You can also use this portal to SECURELY send sensitive documents to your advisory team, like tax returns, social security statements, estate planning docs, non-JSWF financial statements, insurance information, etc.

- **Wealthcare Plan Archive**: SECURE way to access and store your Wealthcare Plans and Status Reports. This also allows you to come back and access your plans from any device, at any time.

How do I get to the client portal?

- Link on the JSW Financial website (www.joelswilliams.com), under Client Access.
- Link in Welcome Email (subject: Welcome to the Wealthcare Capital Management Client Portal)

Step by Step Guide

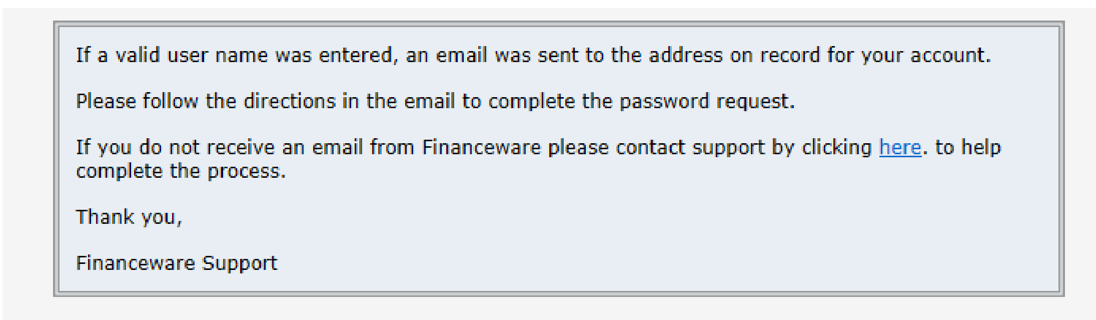
- Before beginning, find email you received from Joel (joelw@joelswilliams.com) with the subject "Welcome to the Wealthcare Capital Management Client Portal". This will contain your logon name and a link to setup your password. If you can't find this email, call the office and have the team resend one.

1. Click the link in the email you received called "Click here to enter your login name and create a unique password' or enter this into your web browser:
   https://clientportal.wealthcarecapital.com/login/forgot_password.aspx?c=1

   You will be taken to a page that looks like this:

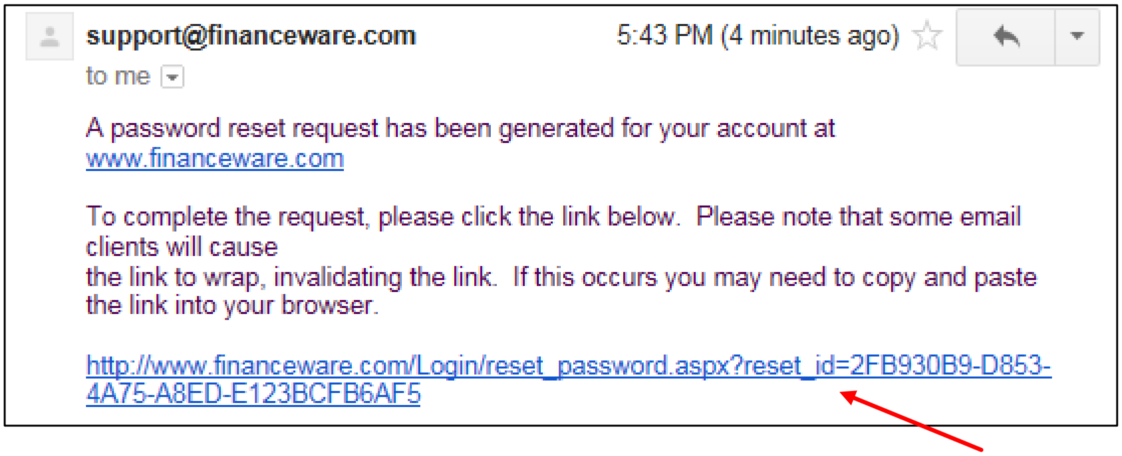
2. Enter your username in the blank and click the 'Reset Password' button.
   (*Yes, this seems odd since you don't feel you have a password yet, but as a first time user you have a default password that it wants you to reset to ensure the security of your information)*

3. *You will receive a confirmation message that an email has been sent to the email we have on file for you. It will look like this:*

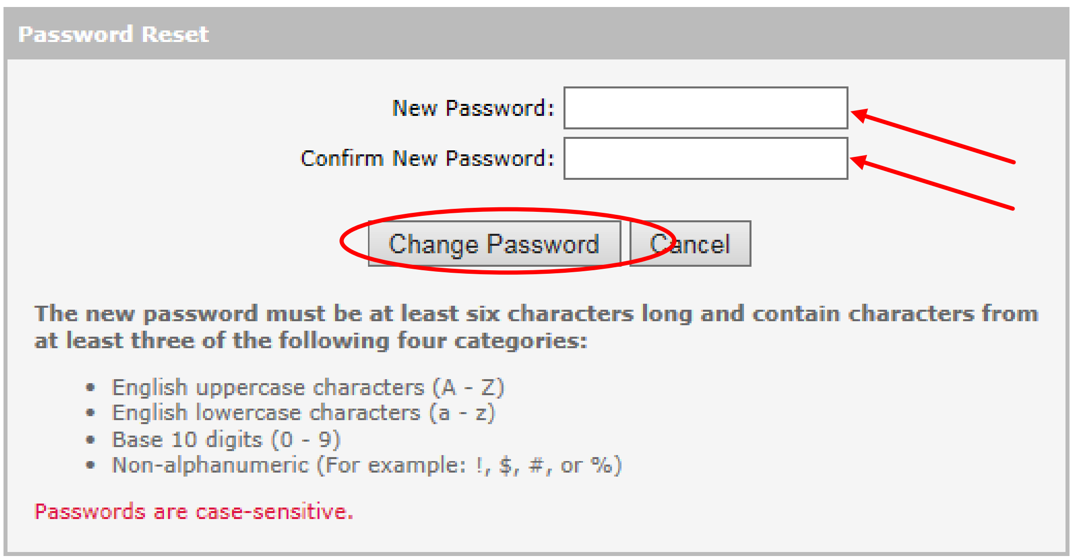


4. You will receive and email from "Support" with the subject "Password Reset Request". It will look like the one below. Click the link at the bottom and it will take you to a page to reset your password.

   (*Yes, this seems redundant but it's to keep your important information safe and you only will have to do this once! By sending you an email before allowing you to reset your password the site was confirming it was really the person (or the email) that they had on file resetting the password)*

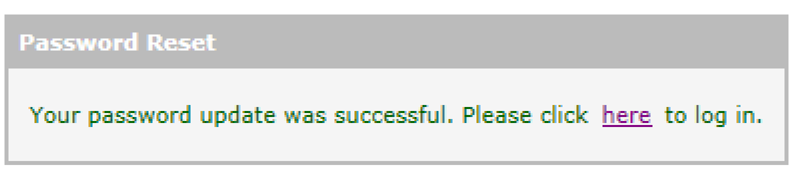


5. Enter the password you would like to use on your account. Then re-enter it again on the second line to confirm you typed it in correctly. Be sure your password meets the standards listed on the screen and remember passwords ARE CASE SENSITIVE.



6. Click ‘Change Password’ button.

7. You will get a confirmation message that your password reset was successful.



8. Now you’re ready to start accessing your Wealthcare Plans!

For more step-by-step guides or video walkthroughs please go to www.joelswilliams.com and select “News & Resources”