

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

## Why would I use the Client Portal?

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- **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?

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

## Step by Step Guide

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- Before beginning, find email you received from Joel ([joelw@joelswilliams.com](mailto: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](https://clientportal.wealthcarecapital.com/login/forgot_password.aspx?c=1)

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

**Password Reset**

Thank you for registering to gain access to your home page at Wealthcare Capital Management. This process will walk you through a password reset that enables you to enter a password of your choosing.

Enter your login name and click the "reset password" button below to initiate the password reset process.

An e-mail will be sent to the address on file that contains a link you will activate to complete the process. After clicking the link, you will be presented with a form that will enable you to enter a new password.

Password reset requests expire after four hours. If you do not use the link within four hours you may return here to initiate another request. If you have any questions, please contact support by clicking [here](#).

Enter your login name here:

**RESET PASSWORD**

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:

If a valid user name was entered, an email was sent to the address on record for your account.

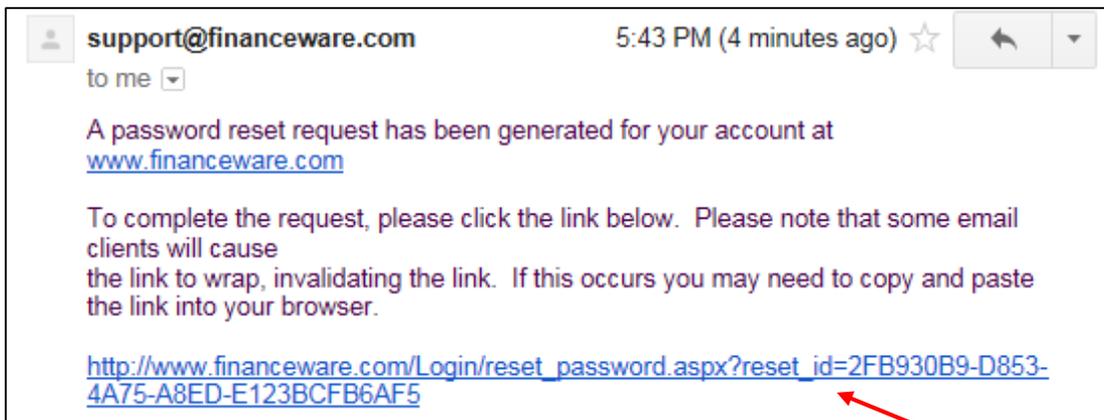
Please follow the directions in the email to complete the password request.

If you do not receive an email from Financeware please contact support by clicking [here](#). to help complete the process.

Thank you,  
Financeware Support

4. You will receive an 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.

A screenshot of a web form titled "Password Reset". It contains two input fields: "New Password:" and "Confirm New Password:". Below these fields are two buttons: "Change Password" and "Cancel". The "Change Password" button is circled in red. Two red arrows point to the right side of the "New Password" and "Confirm New Password" input fields. Below the buttons, there is a list of password requirements: "The new password must be at least six characters long and contain characters from at least three of the following four categories:" followed by a bulleted list: English uppercase characters (A - Z), English lowercase characters (a - z), Base 10 digits (0 - 9), and Non-alphanumeric (For example: !, \$, #, or %). At the bottom, it says "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](http://www.joelswilliams.com) and select "News & Resources"