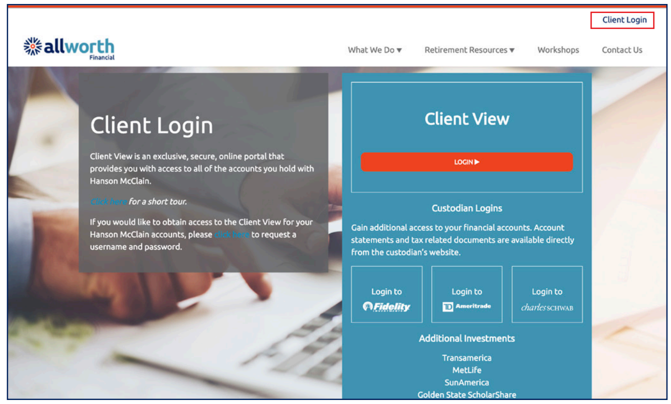
allworth Financial | Accessing Your Accounts

As a Allworth FInancial client, you have direct access to your account information through the *Client View* portal.

Access *Client View* on AllworthFinancial.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.

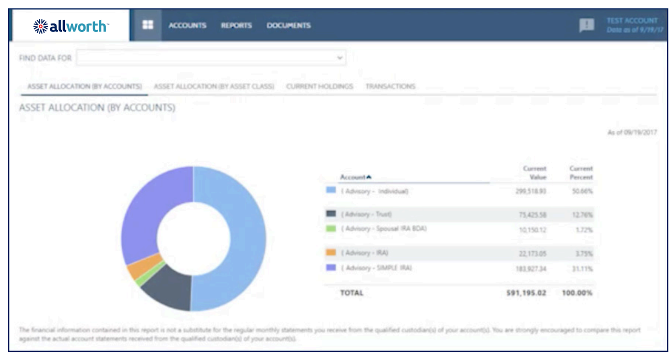


Client View Dashboard

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.

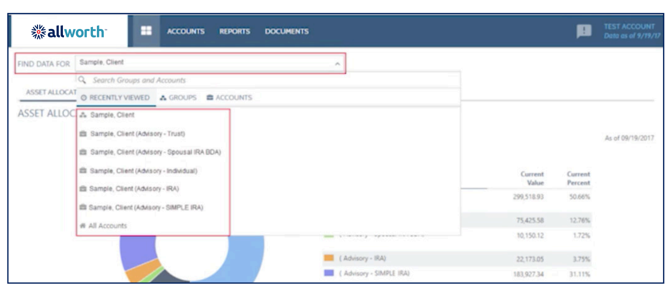
You will be able to view:

- 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 800.482.2196 or email ClientService@AllworthFinancial.com