



Using Foster Financial Client Portal

Hosted by ORION

The **Foster Financial Client Portal**, hosted by ORION, provides a secure and convenient way to manage your financial information and stay connected with our team.:

- View an overview of your accounts at a glance
- Securely upload and share documents directly with our team
- Access your financial reports and Schwab Statements
- View integrated data from your MoneyGuidePro Financial Plan
- Stay up to date with our latest newsletters and insights

How to Access and Use the Document Vault:

1. A link to the Foster Financial Client Portal can be found at <https://fosterfinancial.net/important-links>
Look under “**Foster Financial Client Login.**”
2. Login to your FFS Client Portal
3. Once logged in, click “**Document Vault**”
- Here, you’ll find reports we’ve uploaded for you, as well as any documents you’ve sent us.
4. To send us documents, pictures, or other files:
 - Click the “**Upload**” button in the Document Vault.
5. Once your documents are uploaded, we receive a notification and will review them promptly.

Need Help?

If you experience any trouble uploading documents or accessing the portal, please call our office at **260-234-2200** — we’re happy to help.

Don’t Have Access Yet?

Please note: In order to activate your portal, you must first receive an **invitation** via email. If you haven’t received your invitation, contact us at **260-234-2200** and we’ll resend it.

-The Foster Financial Team

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