

## **Using Foster Financial Client Portal**

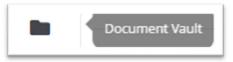
Hosted by ORION

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 <u>https://fosterfinancial.net/important-links</u>
  - 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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