

YOUR INTEGRAL WEALTH PORTAL

A Guide to Getting Started

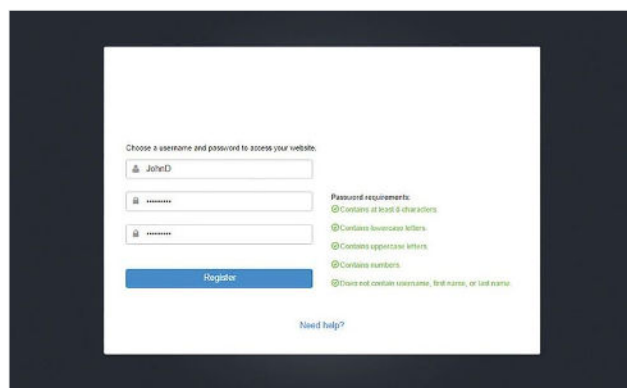
Manage your wealth and your well-being

Your Integral Wealth Portal helps you see your financial life beyond the numbers. And with our automated fact-finding questionnaire, you can get started with your Integral Wealth Portal on your own in just a few easy steps.

STEP 1

Register for your financial website

Click the link sent to your inbox to get started. Then, create your own secure user name and password.



Choose a username and password to access your website.

Username:

Password:

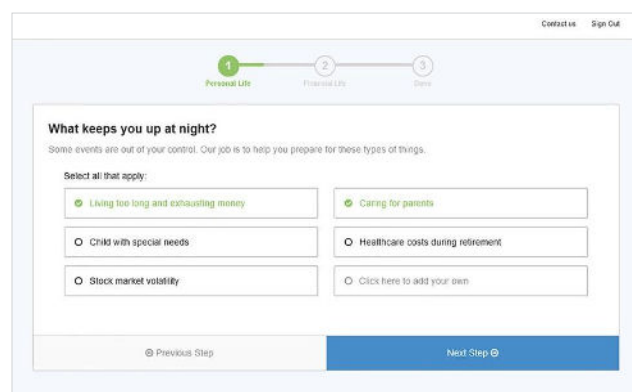
Confirm Password:

Register

Need help?

Password requirements:

- Contains at least 8 characters
- Contains lowercase letters
- Contains uppercase letters
- Contains numbers
- Does not contain username, first name, or last name



What keeps you up at night?

Select all that apply:

- ☒ Living too long and exhausting money
- ☒ Caring for parents
- ☐ Child with special needs
- ☐ Healthcare costs during retirement
- ☐ Stock market volatility
- ☐ Click here to add your own

Previous Step Next Step

STEP 2

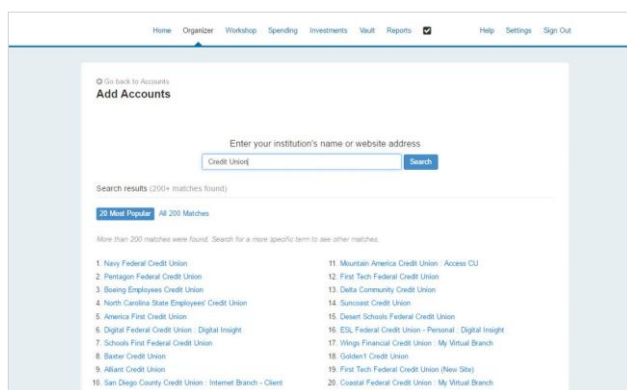
Complete the series of introductory questions

Answer a few basic questions to help us understand your current finances and future goals.

STEP 3

Connect your financial accounts

From your Homepage, click on Organizer, then Accounts to start adding your financial institutions, like bank and credit accounts.



Home Organizer Workshop Spending Investments Vault Reports Help Settings Sign Out

On back to Accounts

Add Accounts

Enter your institution's name or website address.

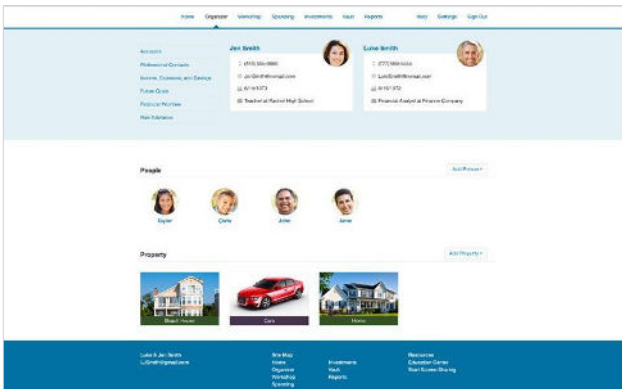
Search

Search results (200+ matches found)

20 Most Popular All 200 Matches

More than 200 matches were found. Search for a more specific term to see other matches.

1. Navy Federal Credit Union	11. Mountain America Credit Union - Access CU
2. Pentagon Federal Credit Union	12. First Tech Federal Credit Union
3. Boeing Employees Credit Union	13. Delta Community Credit Union
4. North Carolina State Employees' Credit Union	14. Suncoast Credit Union
5. America First Credit Union	15. Desert Schools Federal Credit Union
6. Digital Federal Credit Union - Digital Insight	16. ECU Federal Credit Union - Personal - Digital Insight
7. Schools First Federal Credit Union	17. Wings Financial Credit Union - My Mutual Branch
8. Baxter Credit Union	18. Golden1 Credit Union
9. Alliant Credit Union	19. First Tech Federal Credit Union (New Site)
10. San Diego County Credit Union - Internet Branch - Client	20. Coastal Federal Credit Union - My Mutual Branch

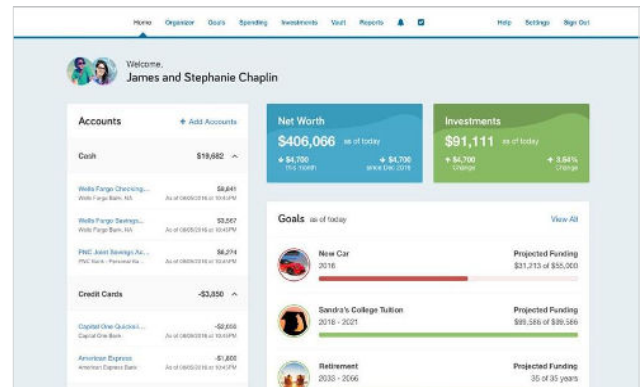


STEP 4 Personalize your portal

Customize your portal by adding photos of what your wealth represents—the people and things most important in your life.

STEP 5 See your finances come to life

Easily organize and track your financial goals with spending and budgeting tools, investment monitoring, and more.



Now you're ready to start managing your wealth with your Integral Wealth Portal!

By combining our personal digital experience with the professional guidance only a trusted advisor can provide, we can work together to build and monitor a financial plan that fits your needs.