

Online Client Resource Guide

We'll always be here to get you what you need...

But just in case you need some information and we're not available to help right away, we want you to be aware of all the resources that you have to access the information you need regarding your financial plan and investments.

You can access all of these login pages from our homepage www.integratedpwm.com under "Client Hub" in the upper right part of the screen.

TD Ameritrade

Access your accounts through TD Ameritrade for the following:

- Account statements
- Trade confirmations
- Tax forms
- Account balances
- TD Ameritrade's Institutional Client service team can also be contacted by calling 800-431-3500, option 4

USERNAME:

PASSWORD:

WealthPlan

Use this portal for:

- Access to budgeting tools to help you manage your cash flow
- Monitor action items assigned after our meetings
- See your consolidated net worth statement
- Connect all of your financial accounts under one portal
- Access a variety of client-friendly, easy-to-use financial calculators
- View all financial planning reports that we use in our planning process

USERNAME:

PASSWORD:

iPlan

This tool will allow you to dive deep on all investments in your household that we manage on your behalf. Use this tool if you want to see:

- Historical rates of return on your portfolio(s)
- Detailed account allocation and diversification strategies
- Breakdown of contributions, gains, and withdrawals

USERNAME:

PASSWORD:

AdvicePay

This platform provides an easy and secure way to make monthly, quarterly, semi-annual or annual payments for Financial Planning and Onboarding fees. This site allows you to:

- View your subscription
- Download your invoices
- Make secure payments
- Add or edit payment information at any time

USERNAME:

PASSWORD: