

New Client Portal

February 2018



Dear Valued Clients,

Within several days you will receive an email invitation from McCarthy Grittinger Financial Group providing directions on how to activate an account within our new online Client Portal. Upon receipt of the email invitation you will have 72 hours to complete the steps necessary to activate your account.

The online Client Portal is a secure, transparent and centralized location to view all of your financial accounts managed by McCarthy Grittinger Financial Group. While it is not necessary that you activate your account, it is recommended if you would like easy access to portfolio information such as:

- Asset allocation
- Contributions and withdrawals
- Performance and holdings
- Realized gains and losses
- Transactions



In addition to the information listed above, the Client Portal also contains a secure document vault. This vault is a safe and effective way for our clients and our firm to upload and share confidential documents with one another.

We hope you will consider activating your account within the online Client Portal. Please do not hesitate to reach out if you have questions about the Client Portal or other financial matters.

Sincerely,
The McCarthy Grittinger Financial Group Team