



# The Welshire Advisors Client Experience

Take Control of Your Financial World by Combining Your Finances in One Place.



## **ORGANIZER**

Connect all your accounts for a consolidated view of your entire financial picture.

## **BUDGETING & SPENDING**

Set budgets to help reach your savings goals. Know how much you are spending and where.

## **INVESTMENTS**

Interactive charts and detailed views help monitor all your accounts.

## **MOBILE**

A complete financial picture available on your smartphone.

## **VAULT**

Safely store your most important financial documents, accessible 24/7.

## **GOALS**

See if you're on target to reach your most important goals.

# Getting Started

## Five Simple Steps to Get Set Up

### **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.

### **STEP 4:**

**OPTIONAL: Personalize your website.**

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

### **STEP 2:**

**OPTIONAL: Complete the series of introductory questions.**

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

### **STEP 5:**

**See your finances come to life.**

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

### **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.

### **ONGOING ACCESS**

Use the following link to login from your desktop or laptop:  
[www.linkplaceholder.com](http://www.linkplaceholder.com)

Create a home screen icon on your Android phone/tablet or your iPhone/iPad. See accompanied instructions.



**WELSHIRE**  
ADVISORS

---

Securities offered through Valmark Securities, Inc. Member FINRA, SIPC. Investment Advisory Services offered through Valmark Advisers, Inc. a SEC Registered Investment Advisor. Welshire Capital, LLC and Welshire Advisors are separate entities from Valmark Securities, Inc. and Valmark Advisers, Inc.