



TPFG Website Guide

for Client Use

GETTING STARTED

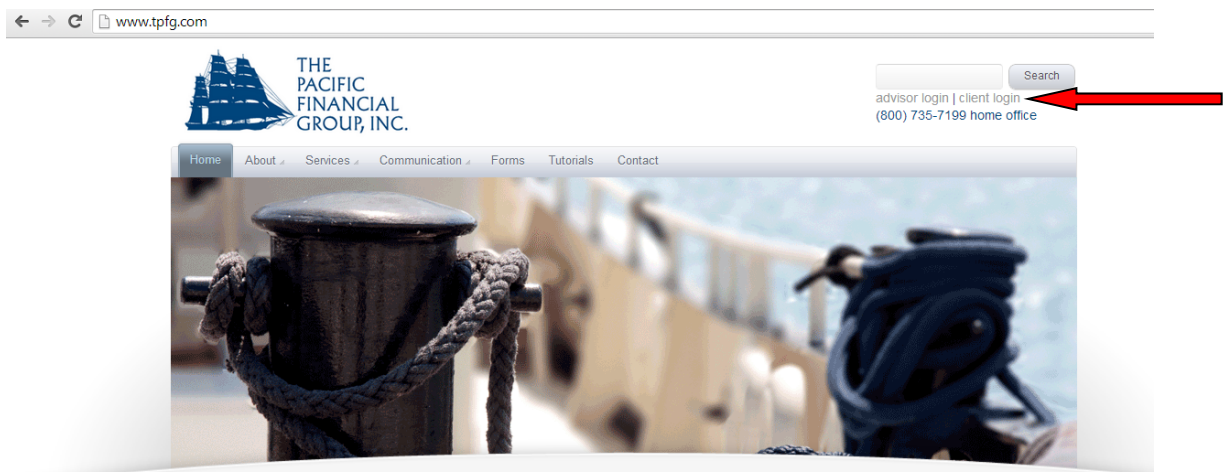
SIGN UP FOR WEBSITE ACCESS

SIGN UP FOR e-STATEMENTS

CANCEL e-STATEMENTS

GETTING STARTED

Visit www.tpfg.com and click “client login”



Enter your login credentials and hit “Login”



Login Menu

Please Login

User ID:

Password:

* Passwords are case sensitive.

Login

Optional Links

- [Forgot Your Password?](#)
- [Create Login](#)
- [Reset Login](#)
- [Check Your Browser](#)

You will be taken to your Portfolio Snapshot. From there, use the Portfolio, Maintain, Resources and My Portal Tabs to navigate the website.

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Portfolio Maintain Resources My Portal

Portfolio Snapshot

View the latest market value of the portfolio.

Management Style

Balanced NTF-NOFEE Por... 100...

Export: CSV Download

Product	Ticker
Balanced NTF-NOFEE Portfolio - Management Style Total: \$ [redacted]	
Pacific Financial Core Equity Inv	PFLQX
Pacific Financial Explorer Inv	PFLPX
Pacific Financial Strategic Conservative Inv	PFLSX
Schwab Money Market	SchwabCash

Portfolio Tab

For current account value click "Portfolio Valuation"

For an account overview, click "Portfolio Dashboard"

For previous statements, click "Statements"

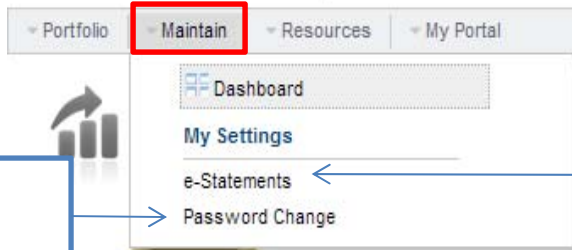
For account activity, click "Transactions"

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Portfolio Maintain Resources My Portal

- Dashboard
- Performance & Statements**
 - Estimated Income Report
 - Portfolio Valuation
 - Statements
- Positions**
 - Consolidated Portfolio Position
 - Portfolio Dashboard
 - Portfolio Position
 - Portfolio Snapshot
- Tax**
 - Gain Loss
- Transactions**
 - Transactions

Maintain Tab



To change your password, click "Password Change"

To sign up for or discontinue electronic delivery of statements, click "e-Statements"

Resources Tab



To view current quarterly portfolio updates, click "Quarterly Fact Sheet"

To contact The Pacific Financial Group, click "Contact TPFG"

My Portal Tab



Portfolio Maintain Resources **My Portal**

To view reports that have been generated and sent to you, click "Report Inbox"

Portal Resources


Document Vault

Report Inbox

To store documents securely and share them with others, click "Document Vault"

SIGN UP FOR WEBSITE ACCESS

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SSN must match the registration attached to the account number entered.

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Login Menu

Create Login
Use this form to create login credentials for this website.

Enter your Account Number: ?

Enter your Social Security Number or Tax Identification Number:

Continue

Please include a "-" in the account number for the following types of account:

- Hewitt XXX-XXXXXX
- Fidelity XXX-XXXXXX
- Fidelity Retirement XXX-XXXXXXXXXX
- Prudential Brokerage XXX-XXXXXX

*For all other types of accounts, please do not use a "-" in the account number.

Complete requested information to create login credentials

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Login Menu

Create Login
Use this form to create login credentials for this website.

Enter a Security Question:

Answer:

Re-type Answer:

User ID:

Note: Must be less than 40 characters.


Enter your Email Address:

Note: Your email address is required.

Re-type your Email Address:


Create Login

Your temporary password will be emailed to you.
Once you log on, you will need to change your password



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▼ Login Menu

 **Create Login**
Use this form to create login credentials for this website.

Congratulations, your account has been created. Your temporary password has been emailed to you. Once you log on, you will be prompted to change your password.

Web Registration

noreply@advisorlynx.com

Sent: Wed 4/9/2014 11:49 AM

To: [REDACTED]

[REDACTED]


Thank you for registering for web access. Your credentials for website access have been successfully created. Below is the temporary password you will use to login to the website for the first time. After successfully answering your security question you will be able to change your password.

User ID: [REDACTED]

Password: [REDACTED]


Thank You,
The Pacific Financial Group

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Password Reset

 **Your password needs to be reset. Please reset your password by completing the form below.**

New Password:

Re-type New Password:

Security Question: dog's name

Answer:

SIGN UP FOR e-STATEMENTS

Go to the “Maintain” tab and click “e-Statements”

- Enter your email address
- Check “I would like to receive my statements via email”
- Click “Sign Up”



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▼ Portfolio ▼ Maintain ▼ Resources ▼ My Portal

Maintain e-Statements Notification

Client: [REDACTED]

Sign up to receive your statements via email.

Your Email Address:

[REDACTED]

I would like to receive my statements via email.

Sign Up

Confirm eStatements notice:

From: noreply@advisorlynx.com Sent: Wed 4/9/2014 4:2
To: Jennifer Rowe
Cc:
Subject: e-Statements Confirmation

A [REDACTED] you have requested to receive a Statement Notice sent to [REDACTED] instead of receiving your statements by mail. You will receive all future statements through this method. Please contact your Advisor with any questions. Thank you for choosing e-Statements.

This message and any attachments are only for the use of the intended recipient. If you are not the intended recipient, please notify the sender by return email, and delete or destroy this message and all copies and attachments. Any unauthorized disclosure, use, distribution, or reproduction of this message or any attachments is prohibited. Personal views expressed are solely those of the sender and shall not be attributed to the company.

CANCEL e-STATEMENTS

Go to the “Maintain” tab and click “e-Statements”

- Check “I no longer want to receive my statements via email”
- Click “Un-register”

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▼ Portfolio ▼ Maintain ▼ Resources ▼ My Portal

Info Notification
Thank you for signing up to receive your statements via email. You should receive a confirmation message at that email address within the next few minutes.

Maintain e-Statements Notification

Client: [REDACTED]

You are currently signed up to receive e-Statement notifications at this email address:
[REDACTED]

Your Address of Record is:
[REDACTED]
[REDACTED]

I no longer want to receive my Statements via email.

Un-register

Cancel eStatements notice:

From: noreply@advisorlync.com Sent: Wed 4/9/2014 10:00 AM
To: Jennifer Rowe
Cc:
Subject: e-Statements Confirmation

A [REDACTED] you have requested to cancel e-Statements and receive a printed version of future statements by mail only. You will receive all future statements through this method. Please contact your Advisor with any questions. Thank you.

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