

**Thank you for visiting our client portal! The first time you log in or if you forget your password, you will need to go through the following steps to create a password:**

1. At the login screen, enter your user ID which is your work e-mail address.
2. Select "Forgot Password?" in the lower left corner.
3. Enter your e-mail address again where prompted (it must match the user id entered above) and click Submit.
4. A randomly generated password will be sent immediately to your inbox (you may need to check your junk folder). Use it to enter the portal. If you copy and paste the password, be careful to avoid copying any extra spaces.
5. You will be directed to a page to create your preferred password. For security purposes, it must contain at least one capital letter **and** one lower case letter. It also must contain at least one number **or** one symbol. Type in the new password, confirm it, and click Submit.
6. If your password meets the security requirements, you will see "Password has been saved." You are ready to start exploring the site.

**What to do if you do not receive the e-mail with your temporary password or receive an error message upon authenticating:**

1. Double check your junk/spam folder for the temporary password e-mail.
2. Double check that you did not include any extra spaces or mis-type the temporary password. It is case sensitive.
3. Ask your firm's portal administrator to verify you have a user account. Your Firm Administrator/Office Manager and IT contact(s) have the "portal administrator" rights to add/modify/delete user accounts as needed. They can do this by logging in to the portal and visiting the Support>Modify Profile page. As soon as an account for you is created, you'll be able to re-try the steps outlined above.
4. Contact our Help Desk at 800.537.7178 for additional assistance.