Create an iPhone Bookmark

This training guide will demonstrate how to add your financial portal access as a bookmark on your smartphone or device.

1. Open Safari on your iPhone or iPad.



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2. Enter in your log-in URL into the web

Please Note:

To find the URL, please reference the confirmation email sent when you initially registered for your website access or contact your Advisor.

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3. Tap the highlighted icon below.

4. Choose to Add to Home Screen.

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Create an iPhone Bookmark

5. Customize the App Name & tap Add.



6. The log in bookmark will now be accessible from your home page!

