



## A Portal for Every Piece of Your Financial Life



The Schneider Downs Wealth Management online financial management portal provides the tools you need to manage the most important parts of your financial life—from any device.



### Collaborate with Our Team

- Web chat or screen share with our team directly through your portal
- Securely store and share documents in the document vault
- Stay on track and organized with action steps



### View Your Full Financial Picture

- Connect your financial accounts for automatic updates
- See and update your financial goals
- Track investment performance
- Monitor your balance sheet



### Stay Up to Date and Informed

- View key reports on demand
- Email and text communications on dozens of events—like trades, distributions, and model changes
- Access video updates from our team



### Put Your Plans Into Action

- Open and fund investment accounts in a matter of minutes
- Run “what-if” scenarios to see how different decisions affect your plan
- View and update your risk tolerance assessment
- Update your financial goals

### Questions?

Email [clientsvc@schneiderdowns.com](mailto:clientsvc@schneiderdowns.com) or Call 412-697-5331