Thanks for entrusting us to help you work toward your financial goals!

Your account is now open at Betterment.
Here are a couple tips to help you set up your profile, track your performance, and get a holistic view of your financial picture.

Betterment

Add funding accounts

You can link a bank account to easily fund your accounts and move money when needed. Once the account is set up, we'll be here to help with transfers moving forward.

How to add a funding account:
- Log in to your client portal.
- Navigate to Settings, in the lower left hand corner.
- Click on Funding Accounts.
- Select Connect a Funding Account.

Add beneficiaries

You can add a beneficiary or make changes to listed beneficiaries in your account in the dashboard.

Here are the steps you can follow to add beneficiaries:
- Log in to your client portal.
- Navigate to Settings, in the lower left hand corner.
- Click on Accounts.
- Select Add Beneficiaries.

Connect your accounts

You can sync your external accounts and connect each account to the goals you have set up. This will help us get a better understanding of your full financial picture.

How to connect your accounts:
- Log in to your client portal.
- Navigate to Settings, in the lower left hand corner.
- Click on Connected Accounts.
- Select Connect new. Then select Connect instantly.
- Follow the prompts to find your institution and connect your account information.

Use these steps to connect any account that you'd like to be able to see in your dashboard. You can also connect your spouse or family member's accounts to your dashboard. Check out this FAQ to learn more.

Track your goals

Your dashboard is organized by each of your financial goals. Each goal that you have set up is listed on the left hand side of the dashboard home page. You can click into each goal to customize the goal name, learn more about each goal's asset allocation and holdings, and track performance.

Betterment LLC
Support@bettermentforadvisors.com
(718) 400-6898
Monday-Friday, 9:00am-6:00pm EST