


Fund Company	Website	Tech Support	Helpful Hints
	www.mi529advisor.com	(866) 529-8818	<p>New user/existing - under "Account Access" choose the "Investors" option. A pop up will generate advising "You are now leaving mi529advisor.com" choose the "Proceed" option. On the next screen if you are a new user select "Establish User ID". Existing users - simply login</p>
	www.americanfunds.com/individual/	(800) 421-4225	<p>New user - username will be your account number & password is last 4 of social security number.</p>
	https://advisor.fidelity.com	(800) 343-3548	<p>New user/existing - Under "Shareholders" click "Log in to your account". New user - click "Online Registration" and follow the on screen prompts.</p>
	www.netbenefits.com	(866) 691-9559	<p>New user - click "register now" and then follow the on screen prompts.</p>
	www.franklintempleton.com	(877) 632-2301	<p>New user - click "register now" and then select "Individual Investor". You will then need to fill out the account information requested and create a username & password.</p>
	www.thehartford.com/account-access	(860) 547-5000	<p>Under "Individuals & Families" choose the option that best applies to the type of account you have. New user - you will need to register after you select account option.</p>

	www.jackson.com	(877) 565-2968	"Sign in" button located at top right hand corner. New user - click "register" next to sign in. Follow the on screen prompts to create a username & password.
Jefferson  National	www.jeffnat.com	(866) 667-0564	Click "Log in" located at upper right hand corner of webpage. New user - under "Account Holders" in log in screen click "Create Account" follow the on screen prompts.
	www.lincolnfinancial.com	(877) 275-5462	Click "Log in / Register" located upper right hand corner of webpage. New user - Select "Register" . Under "I have a Lincoln product" select the option that best applies to the type of account you have. Follow the on screen prompts.
 OppenheimerFunds®	www.oppenheimerfunds.com/investors/login	(800) 525-7048	New User - Under "New to the Site?" select "Create a User ID and Password" follow the on screen prompts.
P I M C O	www.pimco.com	(800) 426-0107	Select: "Individual" and then select "Log In" located upper right hand corner of webpage. New User - Select "Register" follow the on screen prompts.
	www.advisorclient.com	(800) 431-3500 option 3	New User - Visit link below for tutorial video on how to set up your account access online. www.brainshark.com/tdameritrade/newuser
 Client Web Portal	https://adminnew.morningstar.com/crmwebportal/cwphome.aspx	(248) 449-8300	Click "How to use?" option for help logging into your web portal.