

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".</p> <p>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>
	https://www.invesco.com/us/accountaccess	(800) 525-7048	<p>New User - click "Log in" and then select "Individual Investor". Under "New User", click "Register" and then follow the on screen prompts.</p>
	www.jackson.com	(877) 565-2968	<p>"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.</p>

	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.
	https://www.nationwide.com/personal/login	(800) 848-6331	Under " log in/sign up ", select your account type, then click " Sign up for an online account ". Follow the on screen prompts.
	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.
	https://www.talcottresolution.com	(800) 862-6668	New user - click " Annuities Login " and then select " Register " and 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
	https://fp.morningstar.com/	(248) 449-8300	If you have forgotten your password, click " Forgot your password ". If you are not sure if your web portal has been enabled, please call our office for assistance.