Access Your Portfolio Anytime, Anywhere

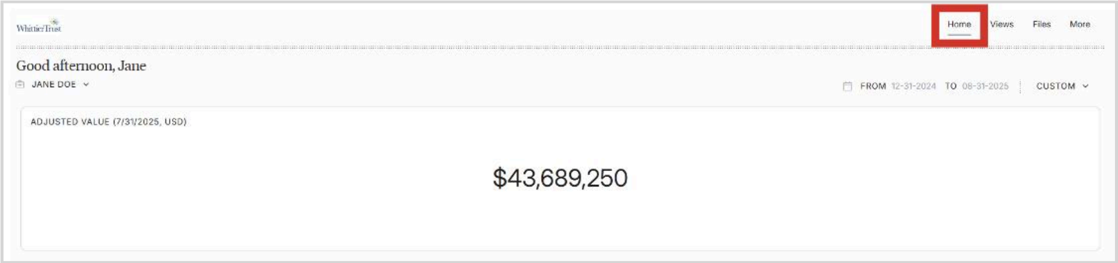
With the Addepar Client Portal and Mobile App (available for Apple devices), you can view a comprehensive, real-time snapshot of your portfolio—anytime, anywhere—all with the tap of a button.

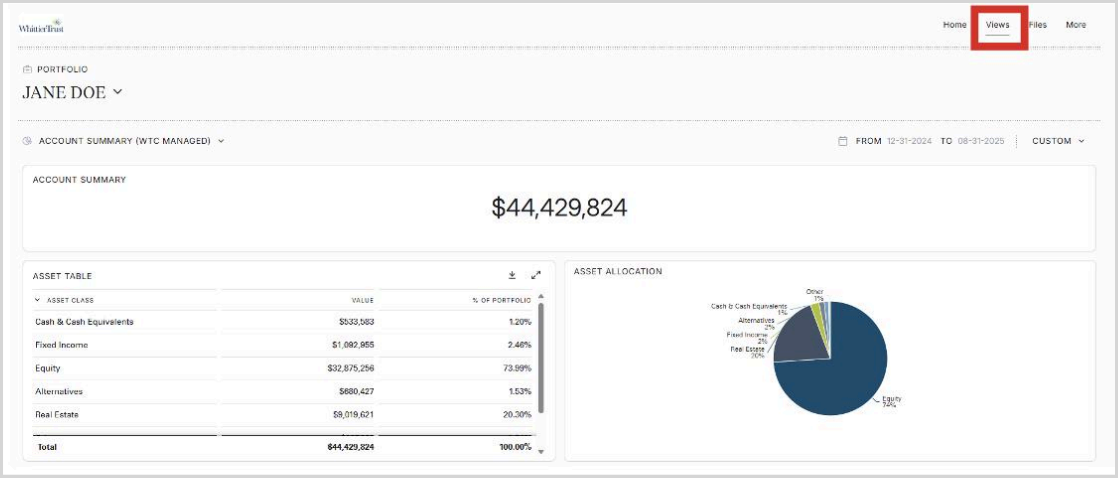
Before getting started, you should have received an email from no-reply@addepar.com containing your secure access link. If you haven't received this email, please contact your advisor for assistance.

How to Navigate the Client Portal

Logging into the portal will take you to the Home page, which provides a quick snapshot of your current balance.

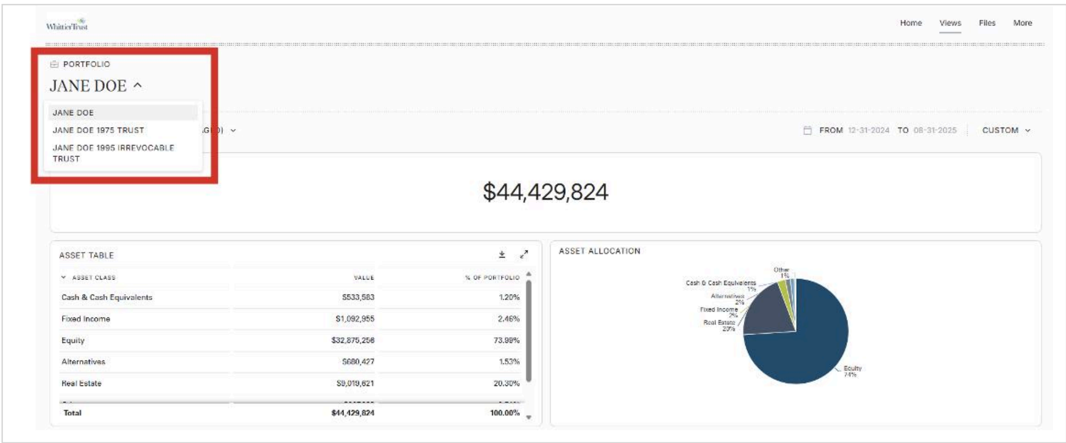
If accessing the portal from a desktop, additional "Views" can be accessed by selecting the appropriate tab in the upper-right corner of the screen. When using an iPhone, these additional "Views" are available at the bottom of the screen.





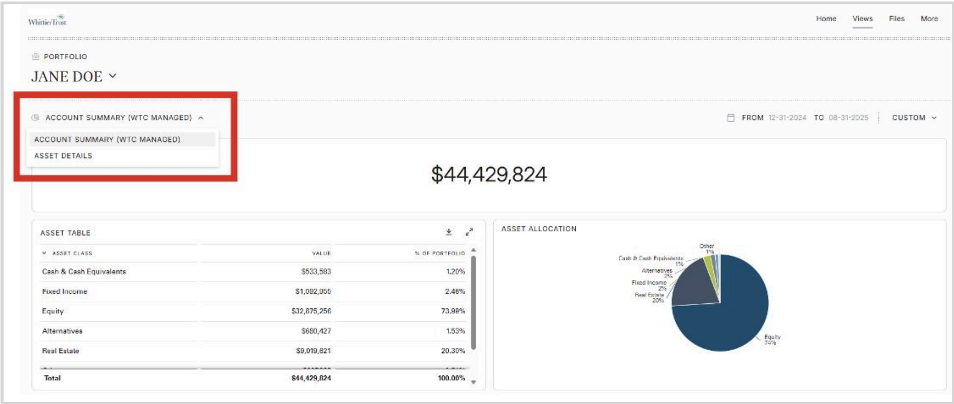
Select a Portfolio

View all portfolios your advisor has shared with you. Select your name to see all entities on a consolidated basis or choose an individual entity to view it on its own.



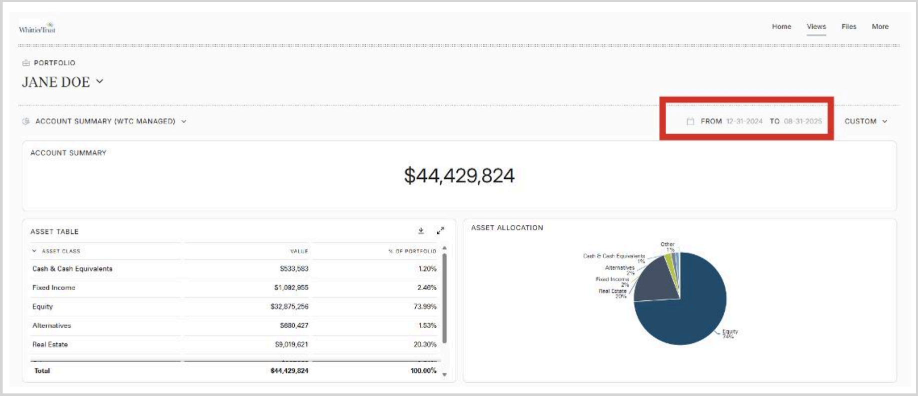
Choose Your View

Toggle between the *Account Summary* for a high-level overview and *Asset Details* for more in-depth portfolio insights.



Adjust the Date Range

Use the date selector on the right-hand side to set a custom date range and review your portfolio over specific time periods.



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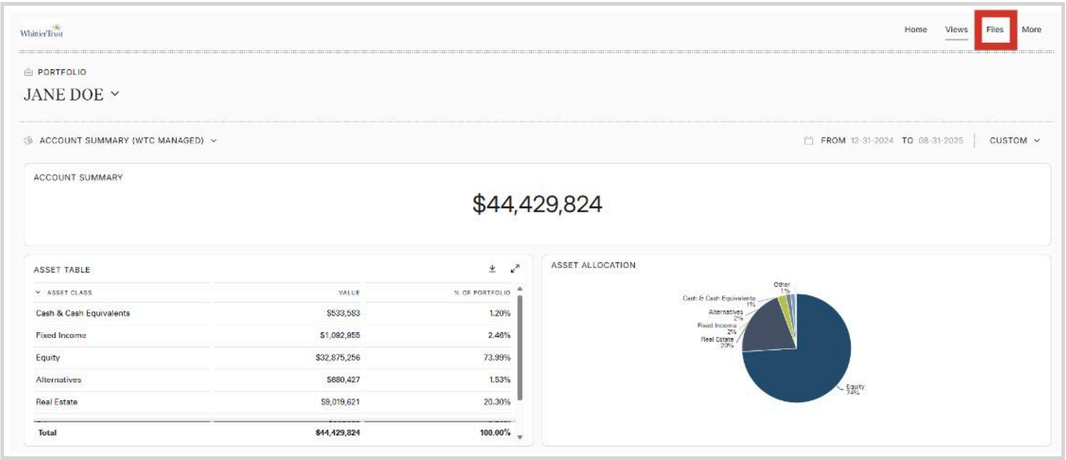
Access Uploaded Files

Click on the Files tab in the upper right corner to view documents uploaded by your advisor, as well as those you've added. You can even use the filter to search for specific files.



Profile Dropdown

From this menu, you can enable or disable two-factor authentication, send yourself a password reset email, or sign out of your account.