# Client Quick Reference Guide

Version: 1.00 | Updated: 11/03/2026 3:11 pm CST | Published: 12/16/2024

Client Success

Tags: Team

## FG Client Services Quick Reference Guide

Financial Gravity (FG) Companies Inc., along with its subsidiary companies, provides investment and tax professionals with a turnkey family office charter. To learn more about each division of our company, here is a list of our websites for your reference:

- https://financialgravityassetmanagement.com/
- https://financialgravityenhancedmarkets.com/
- https://financialgravityfamilyofficeservices.com/

### Who to Contact

Your Client Success Team can be reached at (800) 588-3893 - Press 2.

Make sure to add this number to your save phone numbers! You can also email our team at clientsuccess@financialgravity.com.

**Meet the Client Success Team**




Inv FG
Ass
Services, LLC. (FG Family Office Services), an SEC Registered Investment Adviser. Neither FG Asset Management nor FG Family Office Services provides tax or legal advice and is not a certified public accountant.

## Client Login References

- Client Central Portal Overview
- Financial Planning Overview
- Charles Schwab Overview
- Pontera Overview
- Fidelity Overview

## Client Review Meetings

- What to Expect: Check-In Call
- What to Expect: Review Call

***Authored By: Ashley Baucum***

# Related Articles

*Permalink to this article: https://knowledgebase.financialgravityapps.com/home/quick-reference-guide*

Investment Advisory Services may be offered through Financial Gravity Asset Management, Inc. (FG Asset Management), an SEC Registered Investment Adviser and/or Financial Gravity Family Office Services, LLC. (FG Family Office Services), an SEC Registered Investment Adviser. Neither FG Asset Management nor FG Family Office Services provides tax or legal advice and is not a certified public accountant.