

Client Portal Overview

01/30/2025 12:50 pm CST

Financial Gravity Client Portal Addepar Overview

Financial Gravity provides our clients with an investor portal called "Addepar." Addepar provides access to view their account holdings, balance, allocation and performance reports. Portfolio dashboard where you can view your investments, and access your Financial Foundation reports.

Addepar Client Login link

<https://financialgravity.addepar.com>

Addepar Client Portal Overview Video

[Addepar Client Portal Document](#) 

Addepar Client Portal Overview Video

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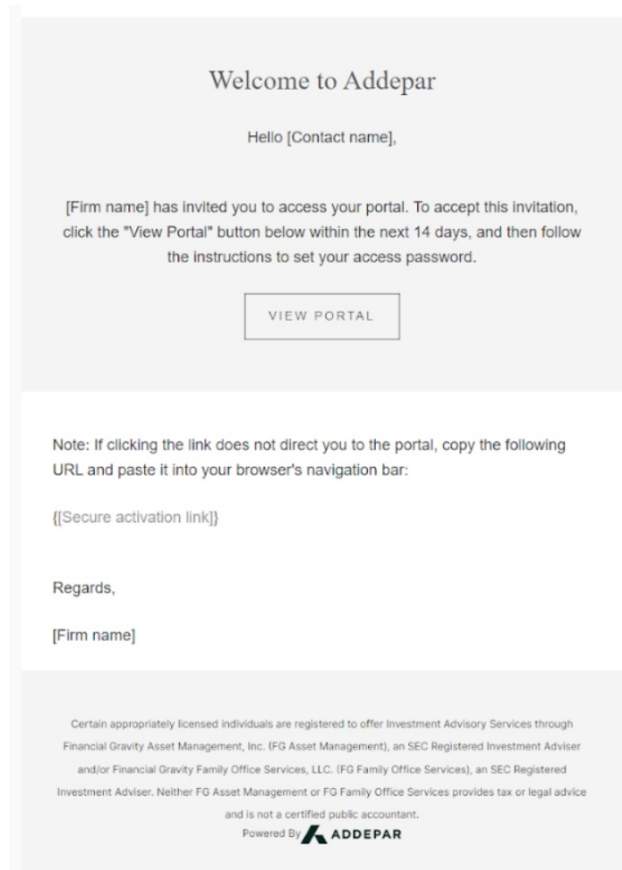
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Sample – Welcome to Addepar Client Invite



Addepar Sample Email Notification

This will be sent out monthly to all FGAM clients. We run monthly performance reports. This is the notification you will receive monthly letting our clients know the report is ready to view.

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New Document Available

Hello [Contact name],

A new document is available in your Portal. Please visit the Files section to view and download the document.

[OPEN PORTAL](#)

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