

Client Portal Overview

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Tags: [Addepar](#)

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.

Client Login link

To log into Addepar, clients should use the Addepar Client Login link: <https://financialgravity.addepar.com>. Simply click the link or copy and paste it into your browser's address bar. Once the page loads, enter your login credentials to securely access your financial information and reports. If you experience any issues logging in, please contact your advisor or support team for assistance.

Client Portal Overview Video

In the video below, we will guide you through the process of logging into the client portal and provide a brief overview of each section. This walkthrough is designed to help you become familiar with the portal's features and navigation, ensuring you can confidently access and manage your financial information.

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Client Portal Overview Documentation

In this documentation, you will find an overview of the Financial Gravity client portal, which provides a detailed walkthrough of each section within the client portal. This guide is designed to help you understand the layout, features, and functionality of the portal so you can efficiently access and manage your financial information.

Download Here: [Financial Gravity Client Portal Overview Document](#) 

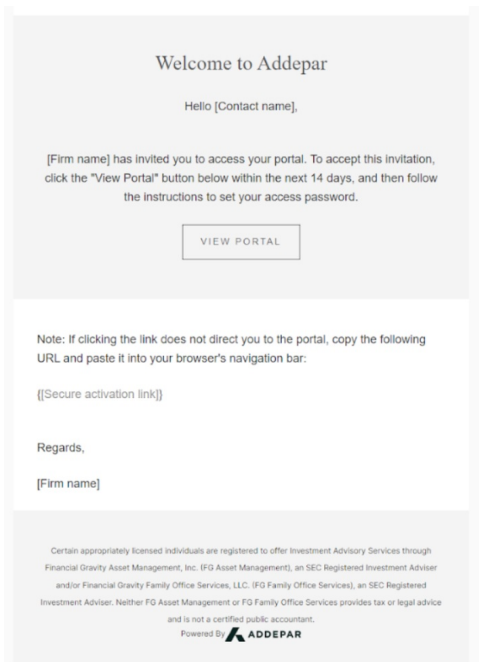


Financial Gravity Client Portal

Navigate the Client Portal : A starting guide.

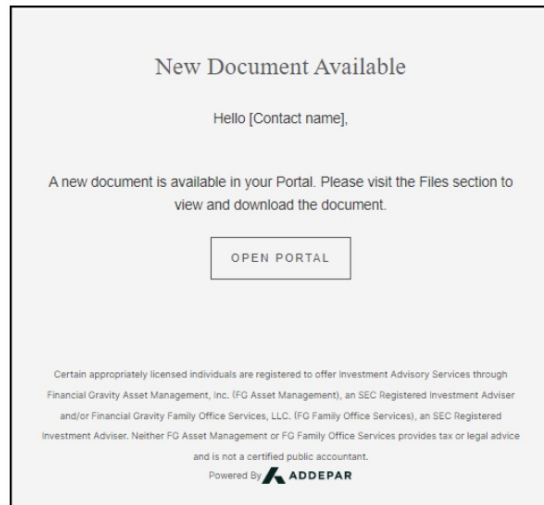
Sample Email: Welcome to Addepar Client Invite

When you're invited to Addepar, you will receive a client invitation email similar to the sample below. This email will contain a secure link to set up your account. Be sure to follow the instructions in the email promptly, as the link may expire after a certain period. If you do not see the invitation in your inbox, please check your spam or junk folder, or contact your advisor for assistance.



Sample Email: New Document 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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Related Articles

Permalink to this article: <https://knowledgebase.financialgravityapps.com/home/fg-client-portal-addepar-overview>

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