Pontera Overview

01/14/2025 10:33 am CST

Held Away Account Management Program

In addition to managing FGAM accounts, Financial Gravity also has a program where we can connect hundreds of company retirement plans that include 401(k)'s, 403(b)'s, 401(a) TSPs, as well as many 529 and 457 accounts.

Program Overview

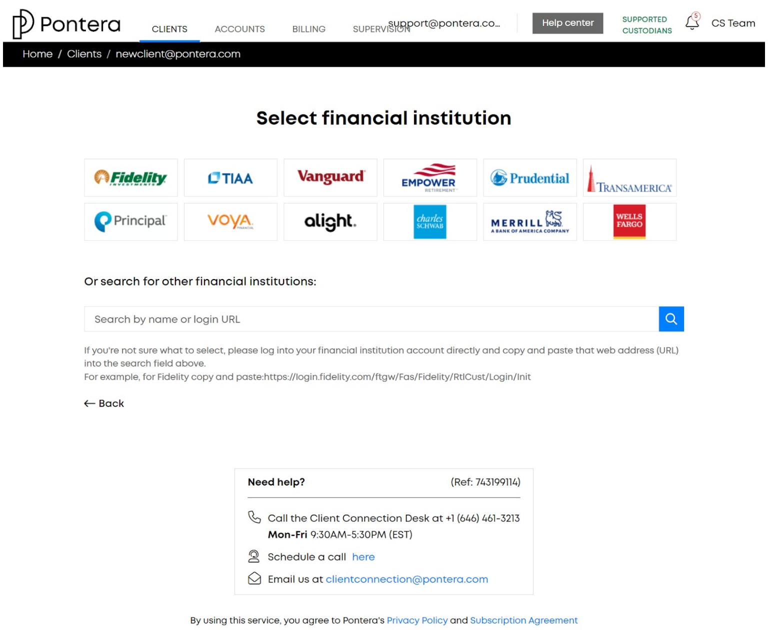
Financial Gravity works with a third party provider, Pontera, to invite client to connect their company retirement plan to our platform and portal. Once connected, FG will have the capability to actively place trades and rebalance these held-away assets to holistically align the portfolio with the client's overall Real Risk Tolerance. In addition, these accounts will also be included in the monthly performance reporting and billing, just like any other account utilizing Addepar.

Interested?

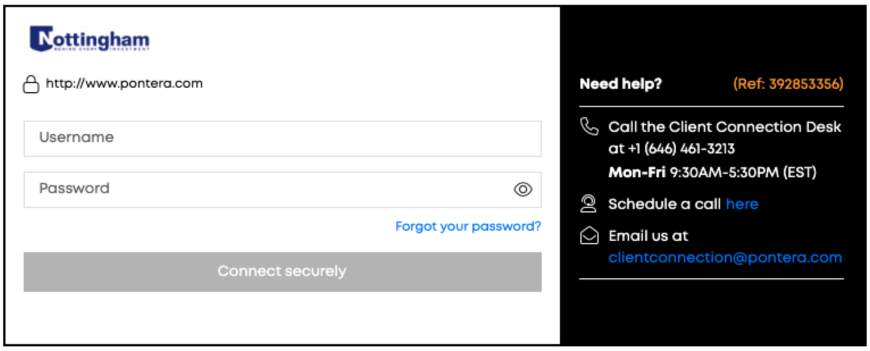
Reach out to your Advisor now or the Client Success Team to learn more about this program!

How to add your account

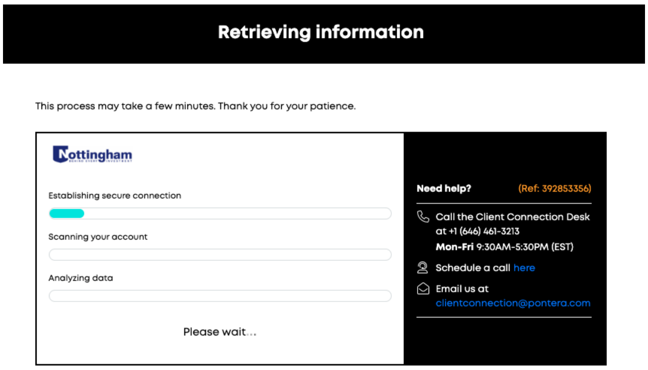
1. Click the link provided by your advisor to connect your account to Pontera and review the overview of the service. Then click Get started.



2. Select the financial institution that holds the held away account. You can select one of the popular options or search for your financial institution by name or login URL:

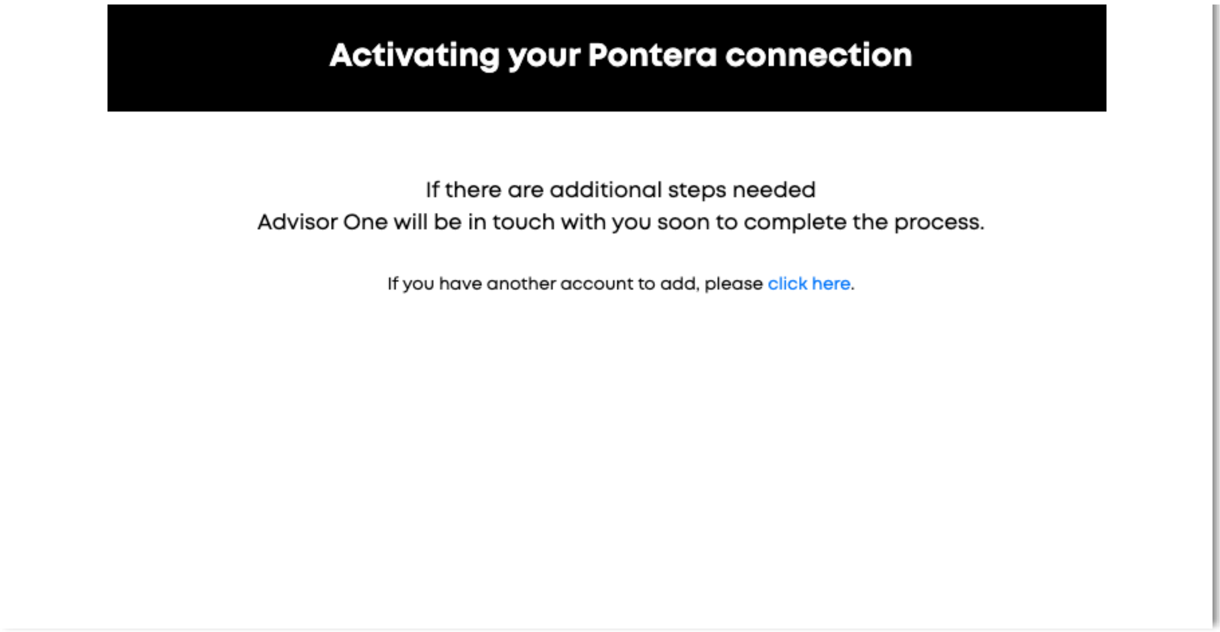


3. Enter the credentials that you normally use to log into your account directly then click Connect securely.We will then work on connecting the account:



4. If you usually log in via security questions, you will be asked to provide the answers to the security questions. If you usually log in by receiving a one-time verification code to your cell phone or email address, you will be asked to enter the verification code into Pontera. To enable the Pontera connection, a unique Pontera phone number and email may be added to your account. You will still be able to login to your account and receive all notifications from your financial institution.

5. When possible, we will provide the phone number or email address. For employer-sponsored plans, select whether your current employer or your previous employer provides the plan. If you have another account to connect, click Add another account. If not, click Finished adding account. You can also add another account by clicking the link in the confirmation screen:


Activating your Pontera connection
If there are additional steps needed
Advisor One will be in touch with you soon to complete the process.
If you have another account to add, please click here.