


Client Resource Hub

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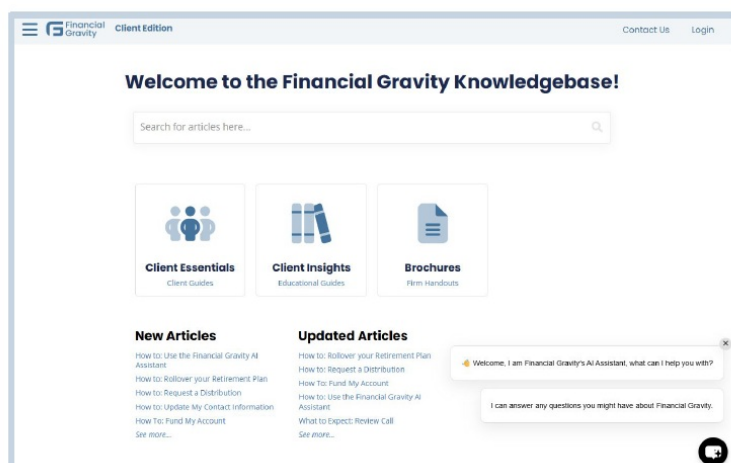
FG Knowledge Base: Your Client Resource Hub

Client Access Made Simple

- Clients can visit: knowledgebase.financialgravityapps.com/home
- Also available under Client Logins on the Financial Gravity website.
- Look for “Client Edition” in the top navigation bar.

What's Inside

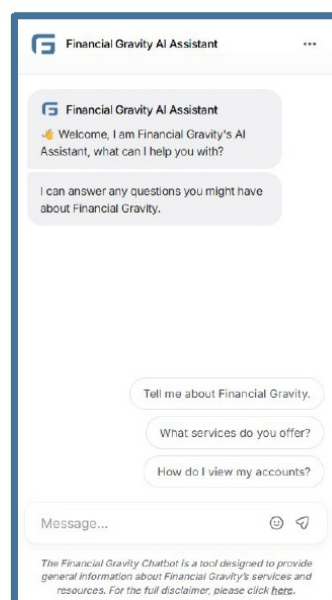
- Client QuickStart Guide
- “How to Share a Document Securely”
- “What to Expect on Your Review Call”
- Firm brochures & step-by-step guides
- Search bar & chatbot make it easy to find what they need.



Meet the FG AI Assistant

A chatbot is available in the bottom-right corner of the public Client Knowledgebase, ready to assist with common questions. Clients can interact directly, and all inquiries are monitored by our team and routed as needed for follow-up.

We encourage you to explore the Knowledgebase yourself so you can confidently guide clients in using it.



This documentation is provided by Financial Gravity Family Office Services, LLC for instructional purposes only. It serves as a general guide to help you understand the onboarding process. Please do not share sensitive information through unsecured channels.



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