Alerts

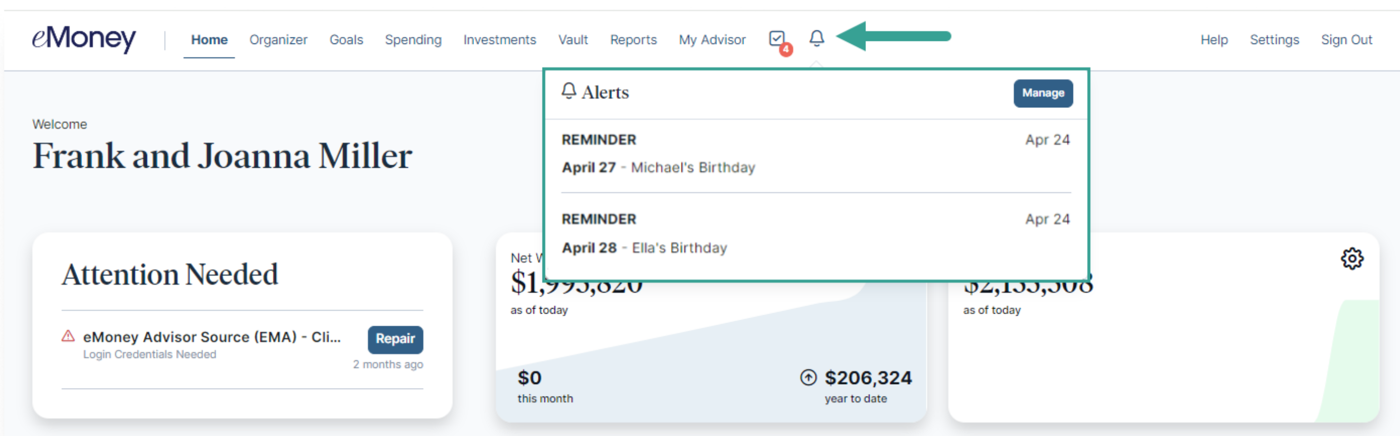
This User Guide details how to access Alerts and their settings on your Client Site.

Alerts can help you stay up-to-date in the planning process. Note that your Advisor may customize the alerts you see on your website.

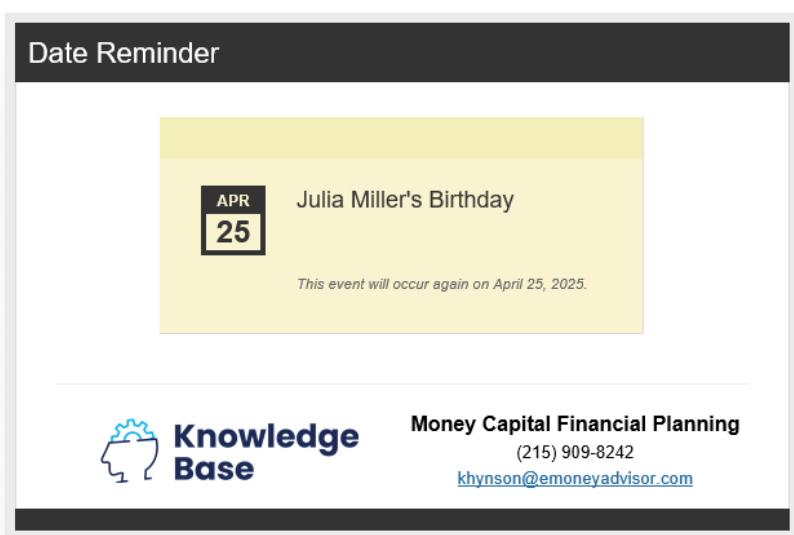
Viewing Alerts

Personal Financial Website Alerts

Click the **Bell** icon on your navigation bar to display triggered Alerts.

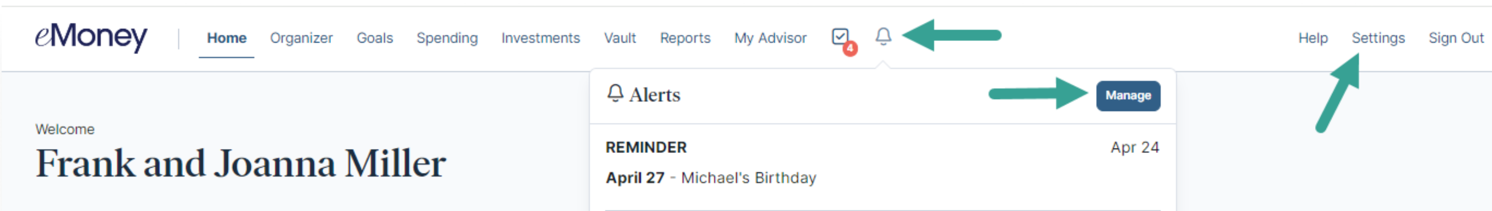


Email Alerts



Accessing Alerts Settings

Click the **Bell** icon, then click **Manage** or click **Settings** on your navigation bar.

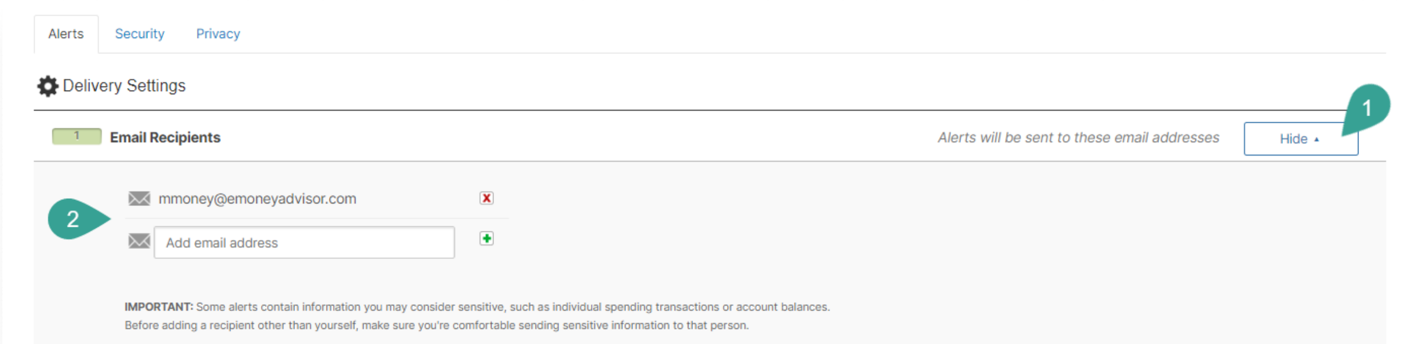


Delivery Settings

The Delivery Settings allow you to decide which events will trigger a notification.

Adding or Editing Email Recipients

Click the drop-down on the right side of Email Recipients to review the email addresses listed. To remove an address, click the x icon. To add a new email address, click the + icon.



Home Page Notifications

Toggle Home Page Notifications to **On** to see triggered alerts for a set number of days before they expire.

Use the toggles on the left side of your screen to turn any alerts on / off. Configure the parameters of that specific alert on the right.

Personal Finance Alerts

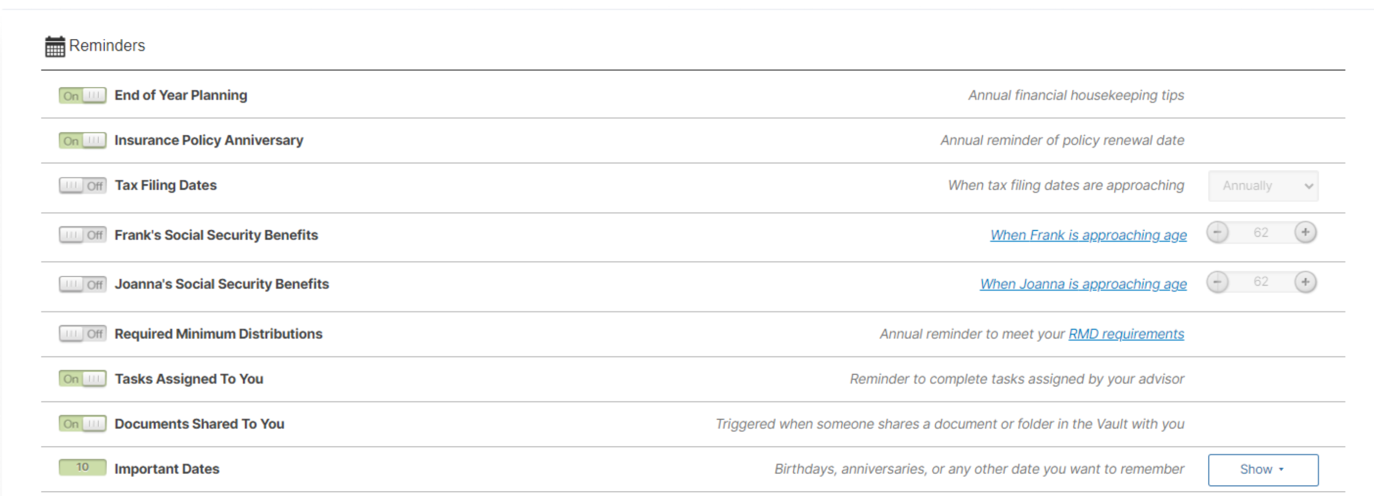
These alerts allow you to set up financial notifications and will reflect the spending information from connected accounts.

Investment Alerts

These alerts display information about the investment holdings in your portfolio.

Reminders

These alerts can be customized with date or age-based options.



Weekly Financial Summary

This summary is emailed to the address(es) on file. Your Advisor may not initially enable this email while your account details are being set up.