

Pontera Client Guide

This guide will show you how to connect your non-advisor managed accounts to the Pontera (aka FeeX) platform after you receive the link from your advisor. Using the Pontera platform, your advisor can view, manage, and trade these "held-away" accounts just like the rest of your investable assets that they manage. By consolidating all of your accounts with one trusted advisor, you will receive the benefits of a holistic, professionally managed, and rebalanced portfolio.

Pontera supports 401k, 403b, 457, HSA, 529 education savings plans, variable annuities and other held away accounts. They are a trusted vendor to thousands of financial advisors and some of the largest financial institutions in the world.

Before you get started you should know that a unique and secure forwarding phone number or email address may be added to your account. This must stay on the account. Select this phone number or email address when logging into your account. This helps your advisor manager your account without asking for multi-factor authentication codes. You may receive a notification from your financial institution that your contact information has been updated.

Step 1

After clicking the link to connect your account, you will see a Welcome Page outlining the service. Please read the notification then click "GET STARTED".







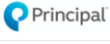





HELLO JANE DOE WELCOME TO PONTERA!

THIS PLATFORM ALLOWS YOUR ADVISOR TO
ACCESS AND MANAGE YOUR ACCOUNTS.

Step 2

Select the Financial Institution that holds the held-away account. You can select one of the popular options listed or search for your financial institution by name or by entering the login URL you normally use to access the account.

Select financial institution

Or search for other financial institutions:


① If you're not sure what to select, please log into your financial institution account directly and copy and paste that web address (URL) into the search field above.

For example, for Fidelity copy and paste:
<https://login.fidelity.com/ftgw/Fas/Fidelity/RtlCust/Login/Init>

[< Back](#)

Step 3

Enter the credentials you normally use to log in to your account directly. Once entered click “CONNECT SECURELY”.



http://www.feex.com

Forgot your password?

CONNECT SECURELY

[Don't know your username?](#)

NEED HELP

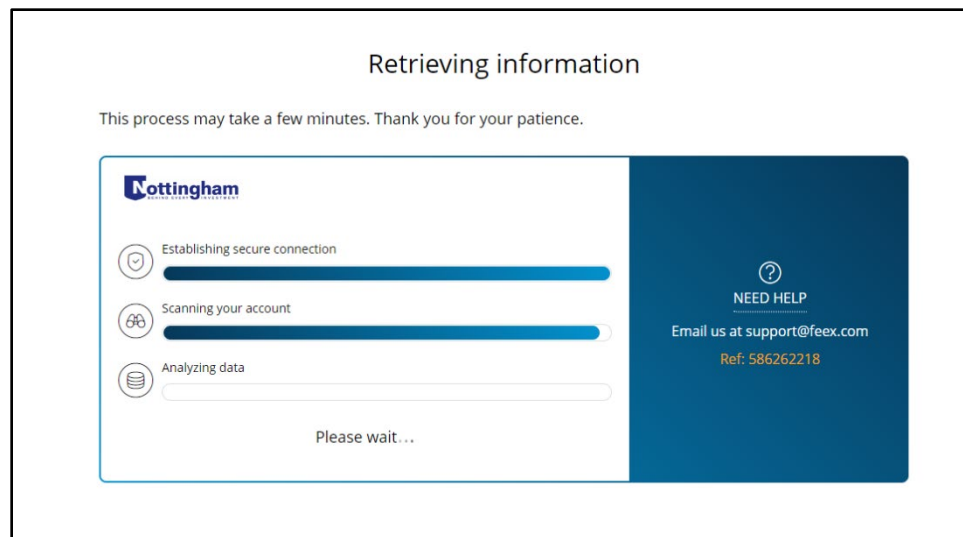
Call us at 1-800-333-6565

Email us at help@yourfirm.com

Ref: 522842211

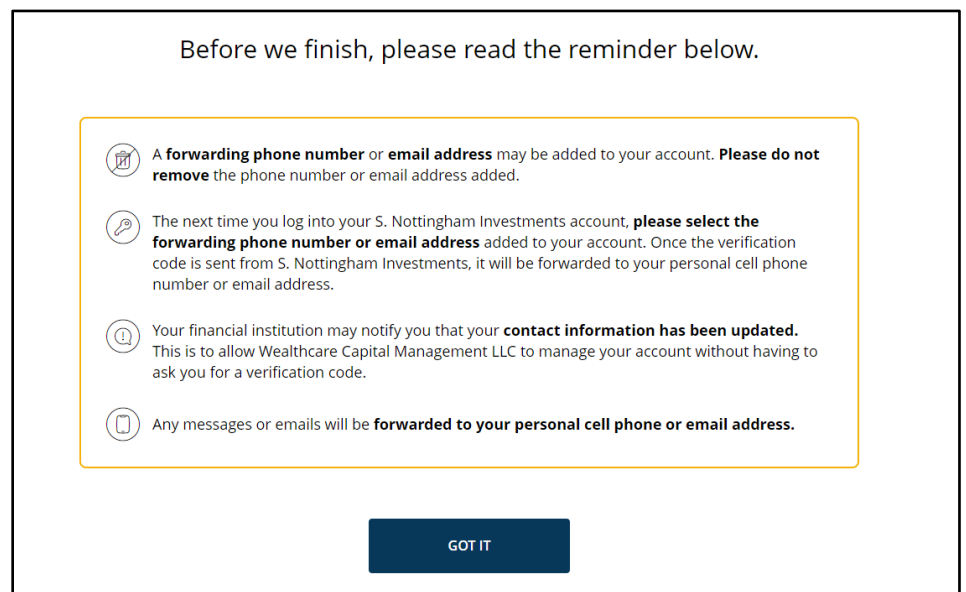
Step 4

Pontera will then work on connecting your account. If you usually log in via security questions, you will be asked to provide the answers. If you usually log in by receiving a one-time verification code to your cell phone or email address, you will be prompted to enter the code.



Step 5


A unique forwarding email address or phone number (as mentioned above) may be added to your account at this point.




Step 6

For employer sponsored accounts, select whether your current or previous employer provides the plan. When complete, click “ADD AOTHER ACCOUNT” if you have additional held-away accounts to add, or if you do not have other accounts choose “FINISHED ADDING ACCOUNT”.

We found the following account!



ACCOUNT NAME	ACCOUNT TYPE	PARTICIPATION STATUS	HELD AWAY MANAGED
GOOGLE INC. 401(K) SAVINGS PLAN - S. Nottingham Investments	401(k)	<input checked="" type="radio"/> Current Employer <input type="radio"/> Previous Employer	<input checked="" type="checkbox"/>


NEED HELP
Email us at support@feex.com
Ref: 586262218

Thank you for connecting this account!

If there are additional steps needed to connect the account, our support team will be in touch with you soon to complete the process.

Alternatively, feel free to contact support@feex.com.

or

Thank you for connecting your account(s). If you have any questions or need further assistance, please contact your advisor or support@feex.com.

