

Instructions for Logging into your Personal Financial Website.

Open an internet browser (Google, Internet Explorer, Safari) go to <https://www.rosamondfinancialgroup.com/client-login>

Select the Personal Financial Website Icon

The Rosamond Financial Group

Username

Password

Sign In

Enter your Username and Password where indicated.

If you have forgotten your **password**, click the “Forgot Your Password?” link

If you do not know your **Username**, please email clientservice@rosamondfinancialgroup.com and they will send it to you.

We are unable to set your password for you but we are able to request an email link be sent to you so you can reset your password.

The Rosamond Financial Group

Username

Password

Remember Me

Sign In

[Forgot your password?](#)

Once you are logged in, go to your Vault

You are viewing this website on behalf of **Luke and Jen Affluent**. To return to your website you need to [sign out](#).

Home Organizer Spending Investments **Vault** Reports Help Settings Sign Out

Welcome,
Luke and Jen Affluent

Accounts	+ Add Account
Cash	\$50,000
Credit Cards	\$0
Investments	\$4,296,140
Life Insurance	\$25,000
Loans	-\$300,000
Property	\$1,250,000
Stock Options	\$25,280

Net Worth
\$5,149,415
as of today
↓ \$7.4M this month ↓ \$7.4M year to date

Investments
\$4,310,649
as of today
↑ \$14,509 Change ↑ 0.34% Change

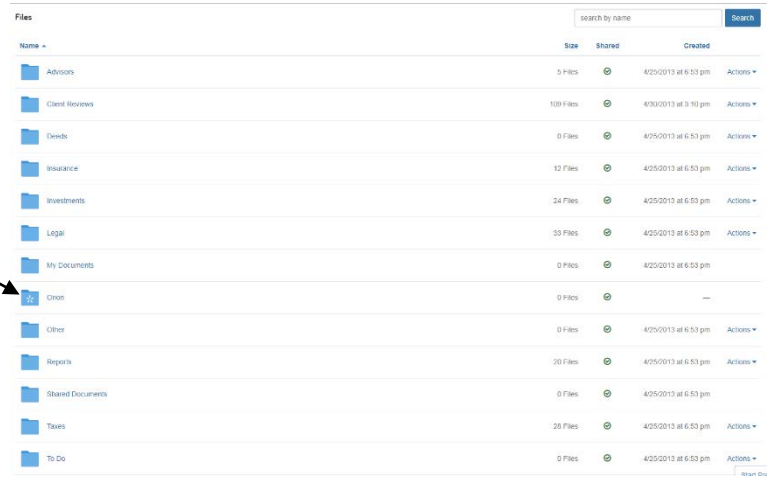
Spending [View All](#)

Spending is not available for Sample Clients.

Protection [View All](#)

Universal Life \$250,000
Luke Affluent

Your folders are in alphabetical order. Fee notices are saved in the Orion Folder.



Name	Size	Shared	Created	Actions
Advisors	3 Files	🔒	4/25/2013 at 6:53 pm	Actions
Client Reviews	108 Files	🔒	4/30/2013 at 3:10 pm	Actions
Deeds	0 Files	🔒	4/25/2013 at 6:53 pm	Actions
Insurance	12 Files	🔒	4/25/2013 at 6:53 pm	Actions
Investments	24 Files	🔒	4/25/2013 at 6:53 pm	Actions
Legal	33 Files	🔒	4/25/2013 at 6:53 pm	Actions
My Documents	0 Files	🔒	4/25/2013 at 6:53 pm	
Orion	0 Files	🔒	—	
Other	0 Files	🔒	4/25/2013 at 6:53 pm	Actions
Reports	20 Files	🔒	4/25/2013 at 6:53 pm	Actions
Shared Documents	0 Files	🔒	4/25/2013 at 6:53 pm	
Taxes	28 Files	🔒	4/25/2013 at 6:53 pm	Actions
To Do	0 Files	🔒	4/25/2013 at 6:53 pm	Actions

Click on the folder to open it and look for the notice named “Year-4th Quarter Statement.pdf” with the most recent date.

Example: 2018 -4th Quarter Statement