

## Instructions for logging in to your Wiser Vault

Your Quarterly Reports and any company wide correspondence will be sent to and stored in your Wiser Vault, which is powered by Morningstar. You will get email notifications every time something is uploaded to the portal. You can also upload and send us documents securely through this portal as well.

To login, go to our web site [www.wiserinvestor.com](http://www.wiserinvestor.com) and where you see Client Login, select Wiser Vault. This will direct you to the login page.

Your login ID is not case sensitive but your password is.

Password changes are done through the login page or by calling our office. You can also change your email address once you log in to the portal.

### **To change your email address:**

You can do this with your original login ID and password. Log in with your old e-mail address and then change it to your new e-mail address.

### **If you forgot your password:**

We can reset your password. You will receive a link via email. Please call Tiffany at 678-905-4450 extension 104 or email her at [tiffany@wiserinvestor.com](mailto:tiffany@wiserinvestor.com) to request a password reset.

**PLEASE SAVE THIS FOR FUTURE REFERENCE**