HUGHES | FINANCIAL SERVICES, LLC

HUGHES FINANCIAL SERVICES, LLC

WEDNESDAY LUNCH & LEARN

Value in your Vault

A GUIDE TO YOUR HFS CLIENT PORTAL

HUGHES FINANCIAL SERVICES, LLC

PANELIST

Berkeley Meredith, CFP®
Financial Advisor

TODAY'S AGENDA

The HFS Client Portal

- What
- Why
- Where
- When
- Who
- How

A GUIDE TO YOUR CLIENT PORTAL

What is the Client Portal?

- Secure, private website for HFS clients
- View up-to-the-minute personal financial information on account balances, performance, allocation and holdings
- Store and share financial documents
- Upload, store and share other important personal documents and files

A GUIDE TO YOUR CLIENT PORTAL

Why use the Client Portal?

ORGANIZER

INVESTMENTS

REPORTS & PROJECTIONS

SECURITY MEASURES

VAULT

TRACK SPENDING

BUDGETING TOOLS

MOBILE ACCESS

A GUIDE TO YOUR CLIENT PORTAL

What can I store in my Client Portal?

LEGAL DOCUMENTS

- ☐ Wills
- ☐ Deeds
- ☐ Revocable and Irrevocable Trusts
- ☐ Power of Attorney
- ☐ Codicils (supplements to a Will)
- ☐ Living Wills/Health Directives
- ☐ Prenuptial Agreements
- ☐ Buy/Sell Agreements
- ☐ Contracts

BENEFITS

- ☐ Social Security Info
- ☐ Veteran's Administration Info
- ☐ Employment Benefits

INSURANCE POLICIES

- ☐ Life, LTD, Disability, Health, Car, Property

BANK & INVESTMENT STATEMENTS

- ☐ Pensions, IRAs, Annuities, etc.
- ☐ Investment Accounts
- ☐ Stock Options/Certificates

LIABILITIES

- ☐ List of Credit Cards with Contact Info
- ☐ Mortgages
- ☐ Loans

TAXES

- ☐ Tax Returns
- ☐ W-2 Forms

IDENTIFICATION

- ☐ Birth Certificates
- ☐ Driver's Licenses
- ☐ Passports
- ☐ Social Security Cards

FAMILY

- ☐ Adoption Papers
- ☐ Medical Records
- ☐ Marriage License
- ☐ Divorce Decree
- ☐ Pictures
- ☐ Audio Files
- ☐ Video Clips

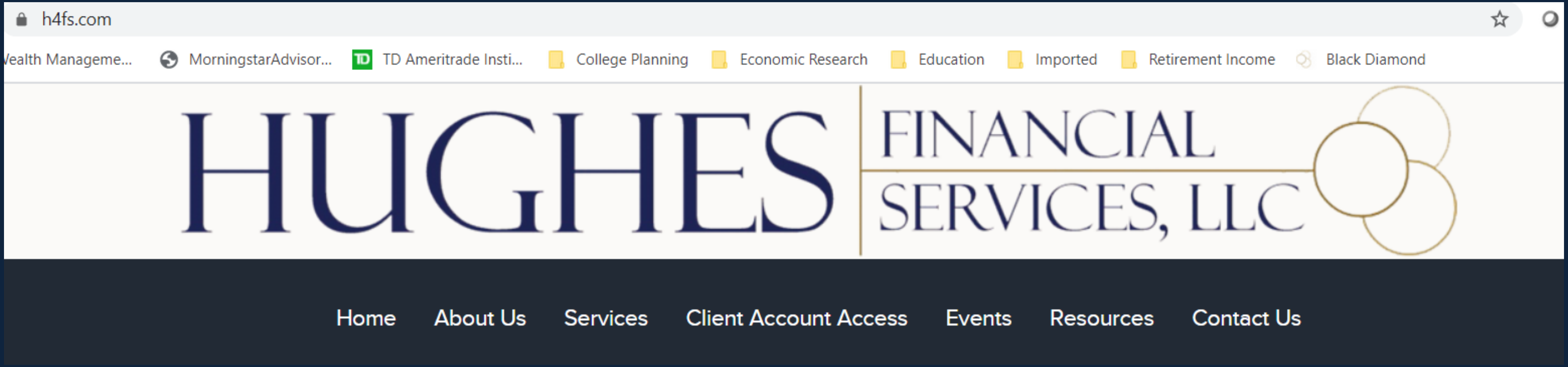
PROPERTY

- ☐ Titles to Homes, Autos, Boats, RVs, etc.
- ☐ Warranties

A GUIDE TO YOUR CLIENT PORTAL

Where is the Client Portal?

- After initial registration process, access Client Portal from HFS home page



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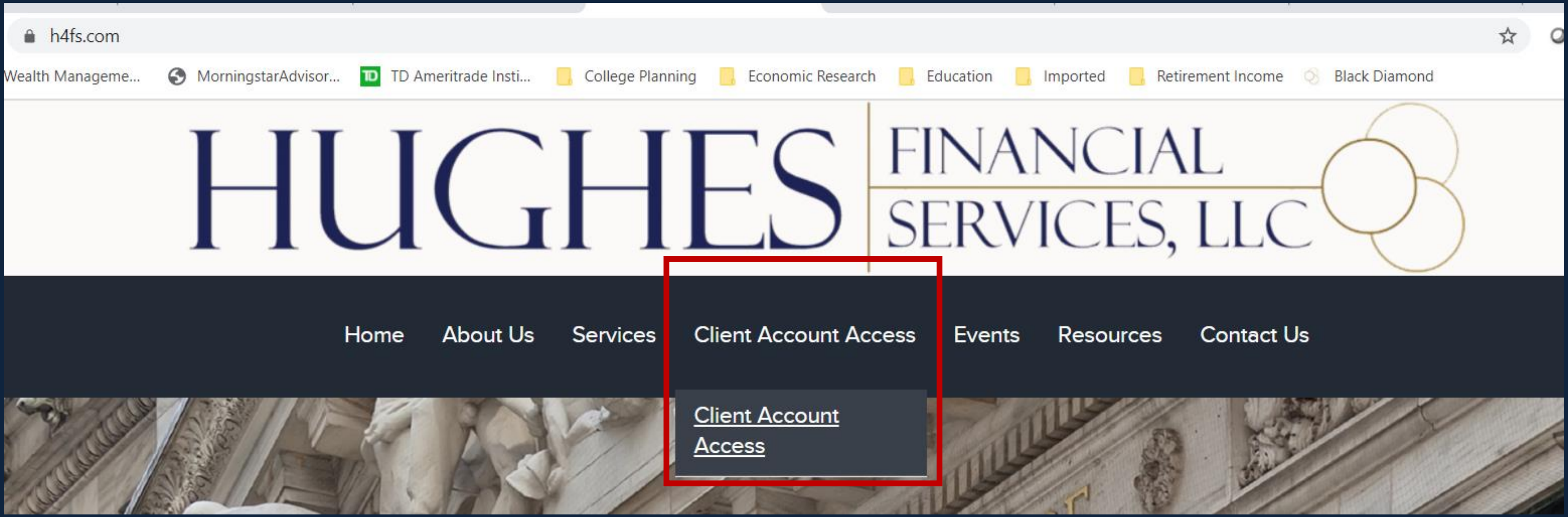

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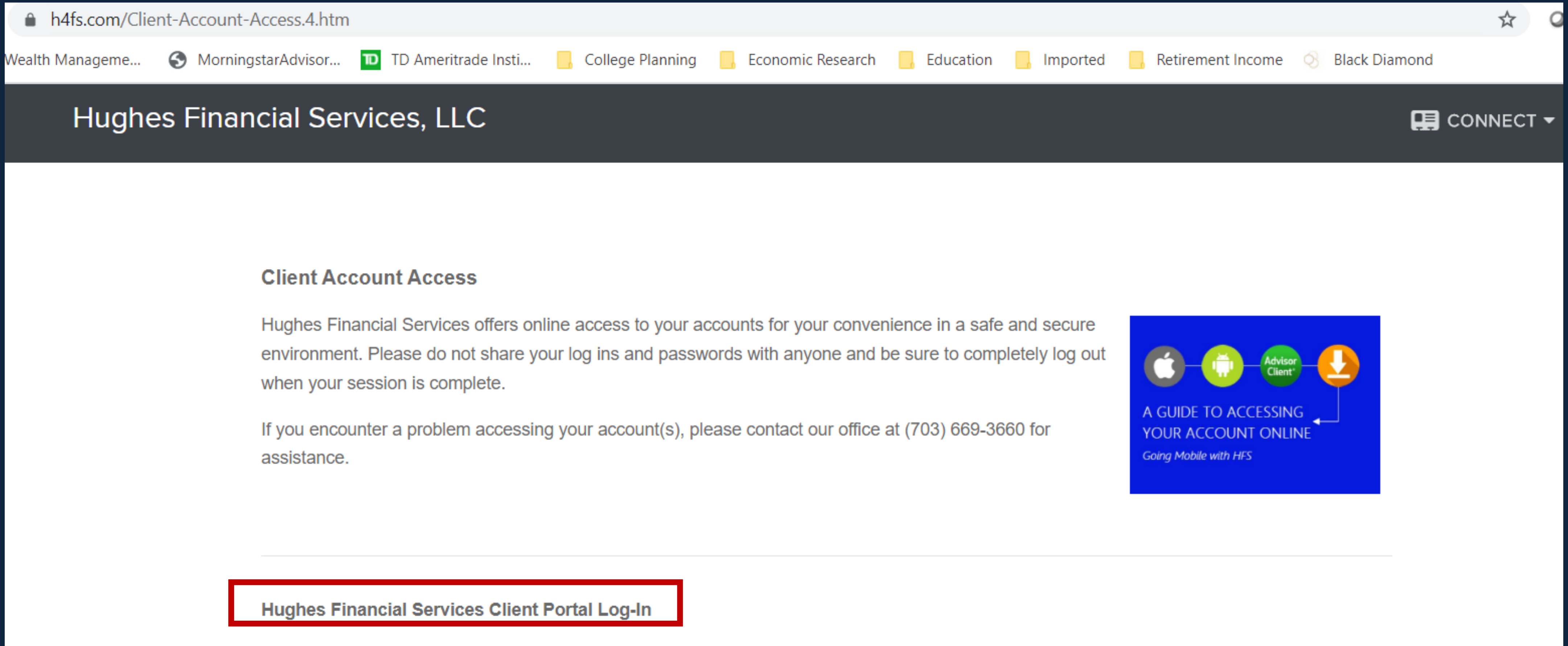

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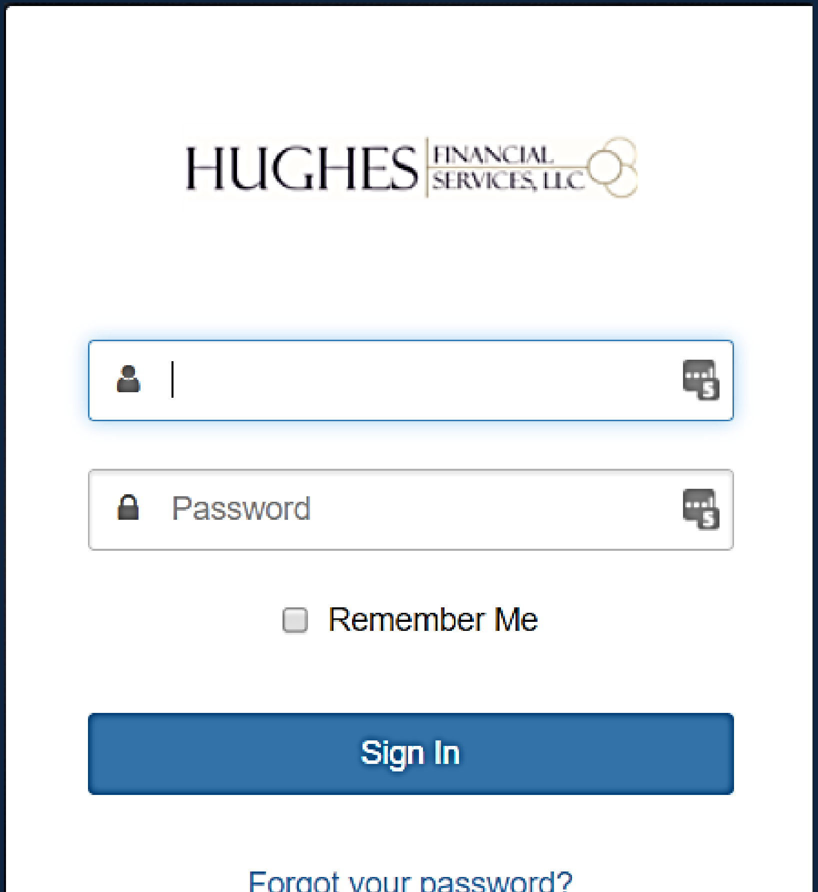

5 STAR TIP

Never use public wi-fi to access your HFS Client Portal due to cybersecurity risks

A GUIDE TO YOUR CLIENT PORTAL

When can I access my Client Portal?

24
HOURS

7
DAYS A WEEK

365
DAYS A YEAR

A GUIDE TO YOUR CLIENT PORTAL

Who can help me with my Client Portal?

Berkeley Meredith, CFP®
Financial Advisor

Elise Dwyer
Client Relations Manager

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A GUIDE TO YOUR CLIENT PORTAL

How does my Client Portal work?

CONNECTIONS

- Tool used to connect other financial accounts to provide your entire financial picture
- Includes: Checking, savings, credit cards, liabilities

VAULT

- Tool used to safely upload and store important financial and personal documents and files
- Designate documents private or shared

Hughes Financial Services will be hosting **20-minute virtual educational Lunch & Learn sessions** during which we'll do a deep dive on an array of financial planning topics. Grab your device and lunch and join us each **Wednesday at 12:00 pm** to juice up your financial planning knowledge!

WEDNESDAY LUNCH & LEARN

RECORDINGS AVAILABLE AT WWW.H4FS.COM

>> Use the Events Tab and Workshops & Webinars Link

- Roth IRAs: To Convert or Not to Convert
- Cybercrime 2020: How to Identify & Protect Against COVID-19 Scams
- Estate Planning Steps to Take During the COVID-19 Pandemic
- Fundamentals of Investing

UP NEXT:
Wednesday, May 6th @ Noon (EST)

REGISTER ONLINE AT WWW.H4FS.COM

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If you have questions about this presentation, please contact us at:
(703) 669-3660 or clientservices@h4fs.com

Hughes Financial Services, LLC, is an independent Registered Investment Adviser (RIA) that works closely with individuals and families, helping them to accomplish their unique financial goals through the allocation of their assets. We are a fee-only firm that seeks to adhere to the highest fiduciary standards and provide clients with advice that is truly unbiased and has only our clients' best interests in mind.

We offer our clients an impressive wealth of expertise in retirement and estate planning, investment and risk management, insurance, and education planning. Our advisers hold a variety of professional designations and certifications and are well versed in a number of financial disciplines. Our combined education and experience allows us to proudly offer you independent financial advice that you can trust.

SOURCES: emoneyadvisor.com

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