

HUGHES | FINANCIAL  
SERVICES, LLC 

HUGHES FINANCIAL SERVICES, LLC



**WEDNESDAY  
LUNCH  
LEARN &**



Value in your  
**Vault**

A GUIDE TO YOUR  
HFS CLIENT PORTAL

# PANELIST



Berkeley Meredith, CFP®  
Financial Advisor

# TODAY'S AGENDA

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## The HFS Client Portal

What

Why

Where

When

Who

How

# A GUIDE TO YOUR CLIENT PORTAL

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## *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

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## *Why use the Client Portal?*



ORGANIZER



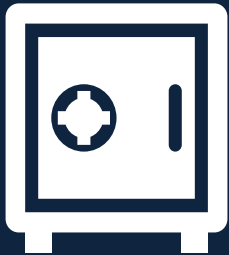
INVESTMENTS



REPORTS &  
PROJECTIONS



SECURITY MEASURES



VAULT



TRACK SPENDING



BUDGETING TOOLS



MOBILE ACCESS

# A GUIDE TO YOUR CLIENT PORTAL

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## *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

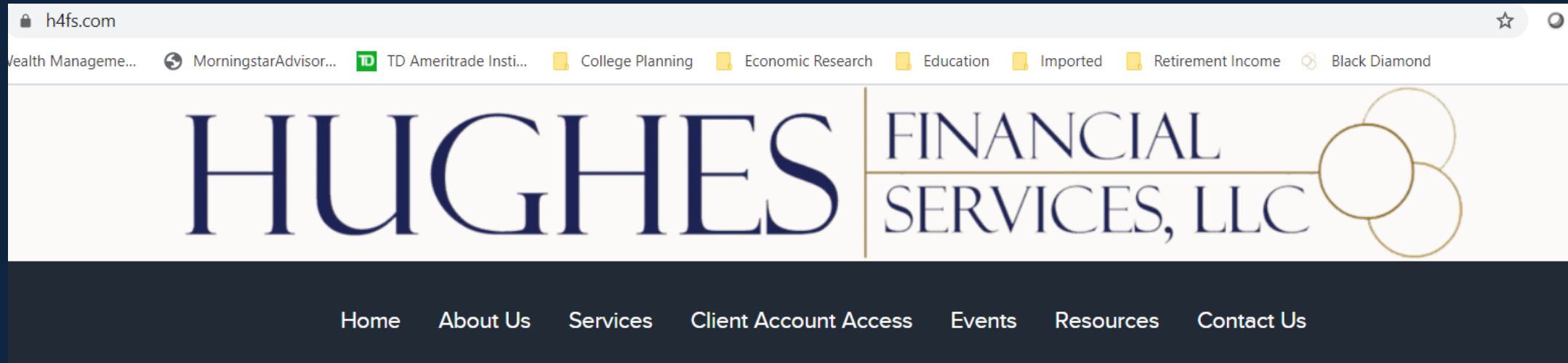
### **PROPERTY**

- 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

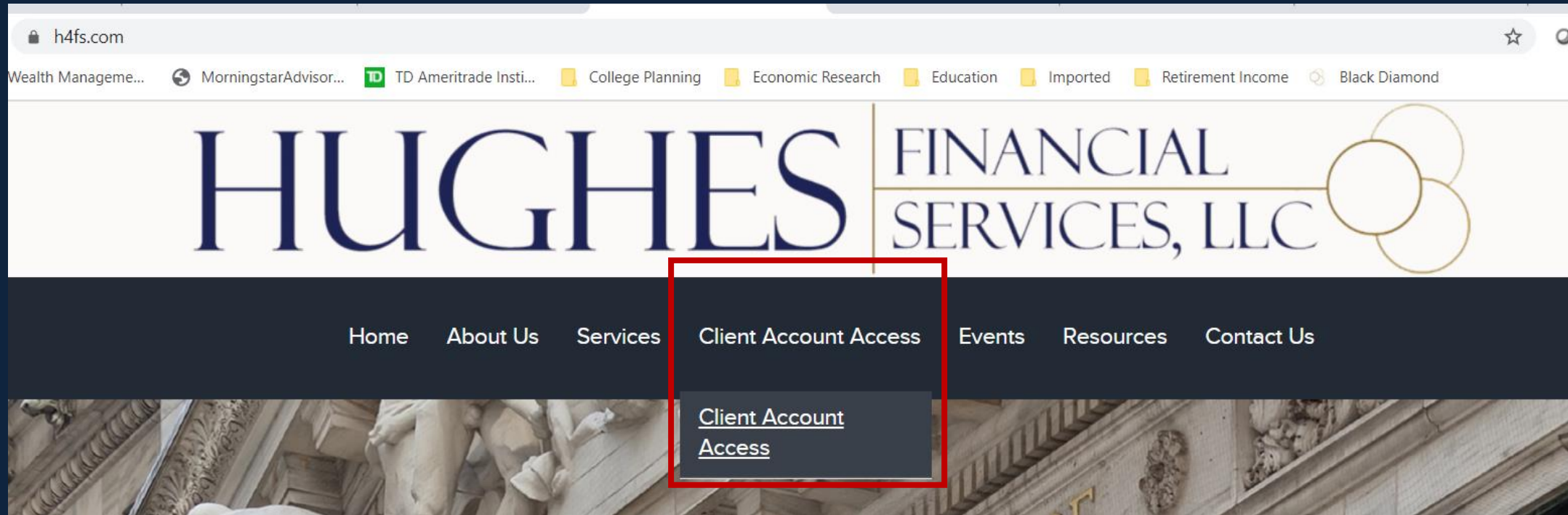




# A GUIDE TO YOUR CLIENT PORTAL

## *Where is the Client Portal?*

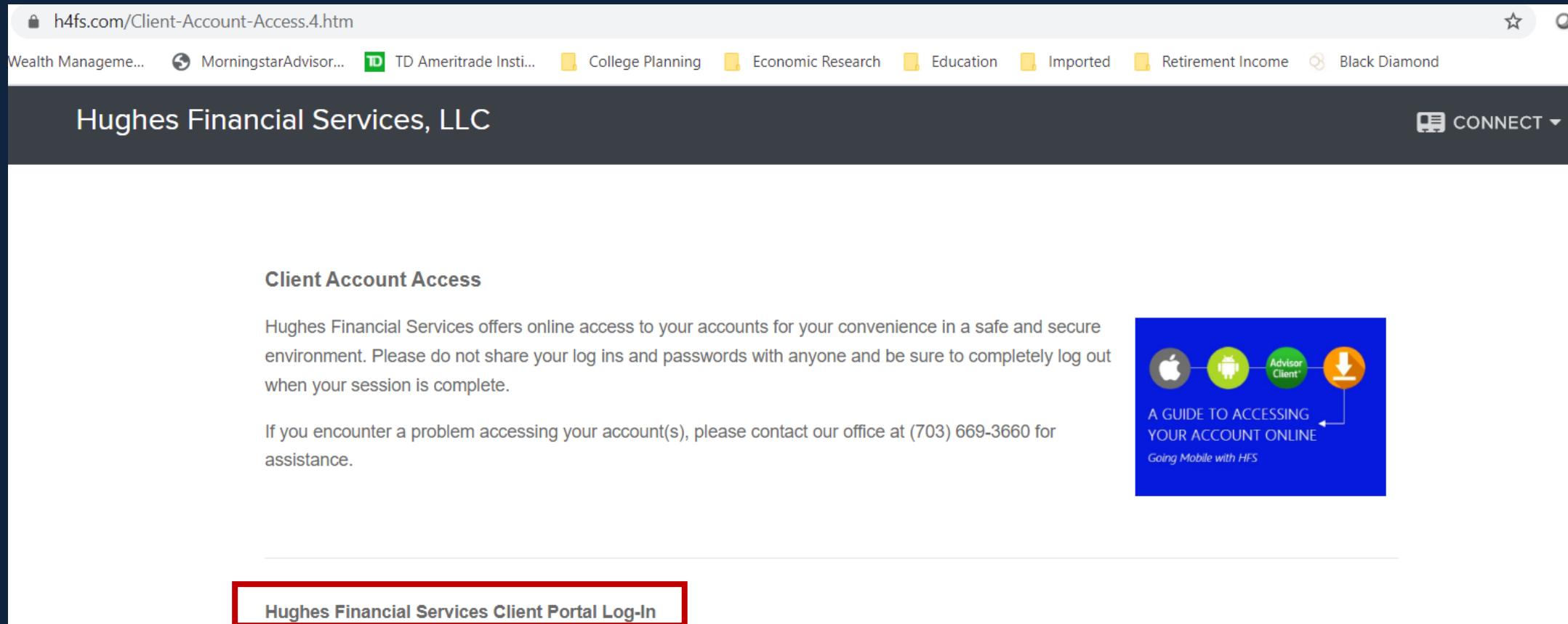
- After initial registration process, access Client Portal from HFS home page



# A GUIDE TO YOUR CLIENT PORTAL

## *Where is the Client Portal?*

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



The screenshot shows a web browser window with the URL `h4fs.com/Client-Account-Access.4.htm`. The browser's address bar and tabs are visible at the top. The main content area features the heading "Client Account Access" and a paragraph explaining online access. A red box highlights the "Hughes Financial Services Client Portal Log-In" button at the bottom of the page.

h4fs.com/Client-Account-Access.4.htm

Wealth Manageme... MorningstarAdvisor... TD Ameritrade Insti... College Planning Economic Research Education Imported Retirement Income Black Diamond


Hughes Financial Services, LLC CONNECT

### Client Account Access

Hughes Financial Services offers online access to your accounts for your convenience in a safe and secure environment. Please do not share your log ins and passwords with anyone and be sure to completely log out when your session is complete.

If you encounter a problem accessing your account(s), please contact our office at (703) 669-3660 for assistance.

**Hughes Financial Services Client Portal Log-In**

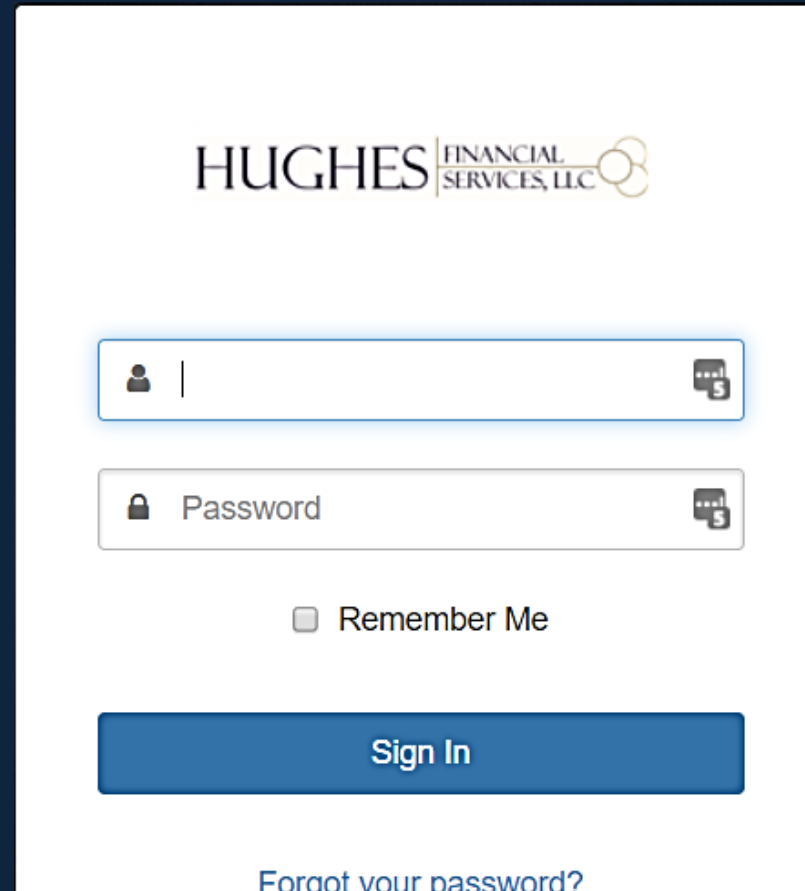


A GUIDE TO ACCESSING YOUR ACCOUNT ONLINE  
Going Mobile with HFS

# A GUIDE TO YOUR CLIENT PORTAL

## *Where is the Client Portal?*

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



The screenshot shows the login interface for the Hughes Financial Services, LLC Client Portal. At the top center is the company logo, which reads "HUGHES FINANCIAL SERVICES, LLC" with a stylized icon of three overlapping circles to the right. Below the logo are two input fields: the first is for the username, indicated by a person icon on the left and a speech bubble icon on the right; the second is for the password, indicated by a lock icon on the left and a speech bubble icon on the right. Below these fields is a checkbox labeled "Remember Me". At the bottom of the form is a blue "Sign In" button. Below the button is a link that says "Forgot your password?".



**5** STAR  
TIP

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

# A GUIDE TO YOUR CLIENT PORTAL

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*When can I access my Client Portal?*

**24**  
HOURS

**7**  
DAYS A WEEK

**365**  
DAYS A YEAR

# A GUIDE TO YOUR CLIENT PORTAL

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*Who can help me with my Client Portal?*



Berkeley Meredith, CFP®  
Financial Advisor



Elise Dwyer  
Client Relations Manager

(703) 669-3660 | [clientservices@h4fs.com](mailto:clientservices@h4fs.com)

# A GUIDE TO YOUR CLIENT PORTAL

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## *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!



## RECORDINGS AVAILABLE AT [WWW.H4FS.COM](http://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

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**UP NEXT:**

**Wednesday, May 6<sup>th</sup> @ Noon (EST)**

**REGISTER ONLINE AT [WWW.H4FS.COM](http://WWW.H4FS.COM)**





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

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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.

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SOURCES: [emoneyadvisor.com](http://emoneyadvisor.com)

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