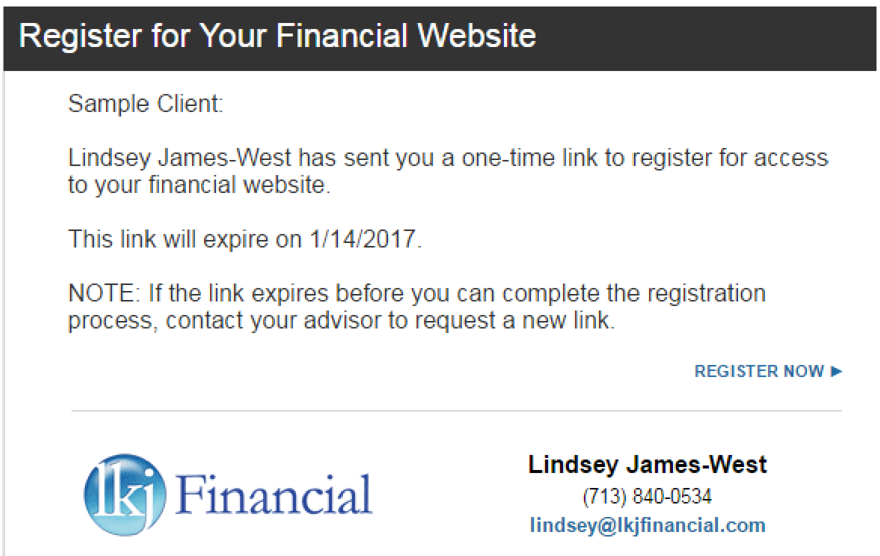
Instructions for LKJ Wealth Portal

If you have spoken with your advisor about having access to the LKJ Wealth Portal, you should have received an initial email that looked like this, inviting you to register for access. LKJ Financial typically grants Wealth Portal access to clients with multiple different accounts from different providers – all of which must have online capability – for more streamlined access.

If you have not received the Wealth Portal registration email or can't remember if you have received it, please contact LKJ Financial to have it resent.


Register for Your Financial Website

Sample Client:

Lindsey James-West has sent you a one-time link to register for access to your financial website.

This link will expire on 1/14/2017.

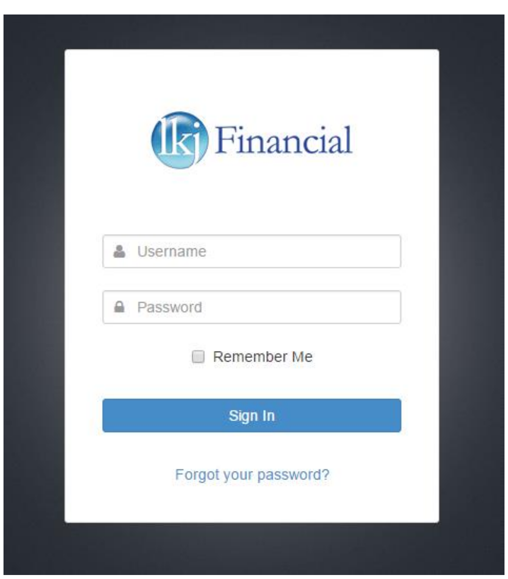
NOTE: If the link expires before you can complete the registration process, contact your advisor to request a new link.

REGISTER NOW ▶

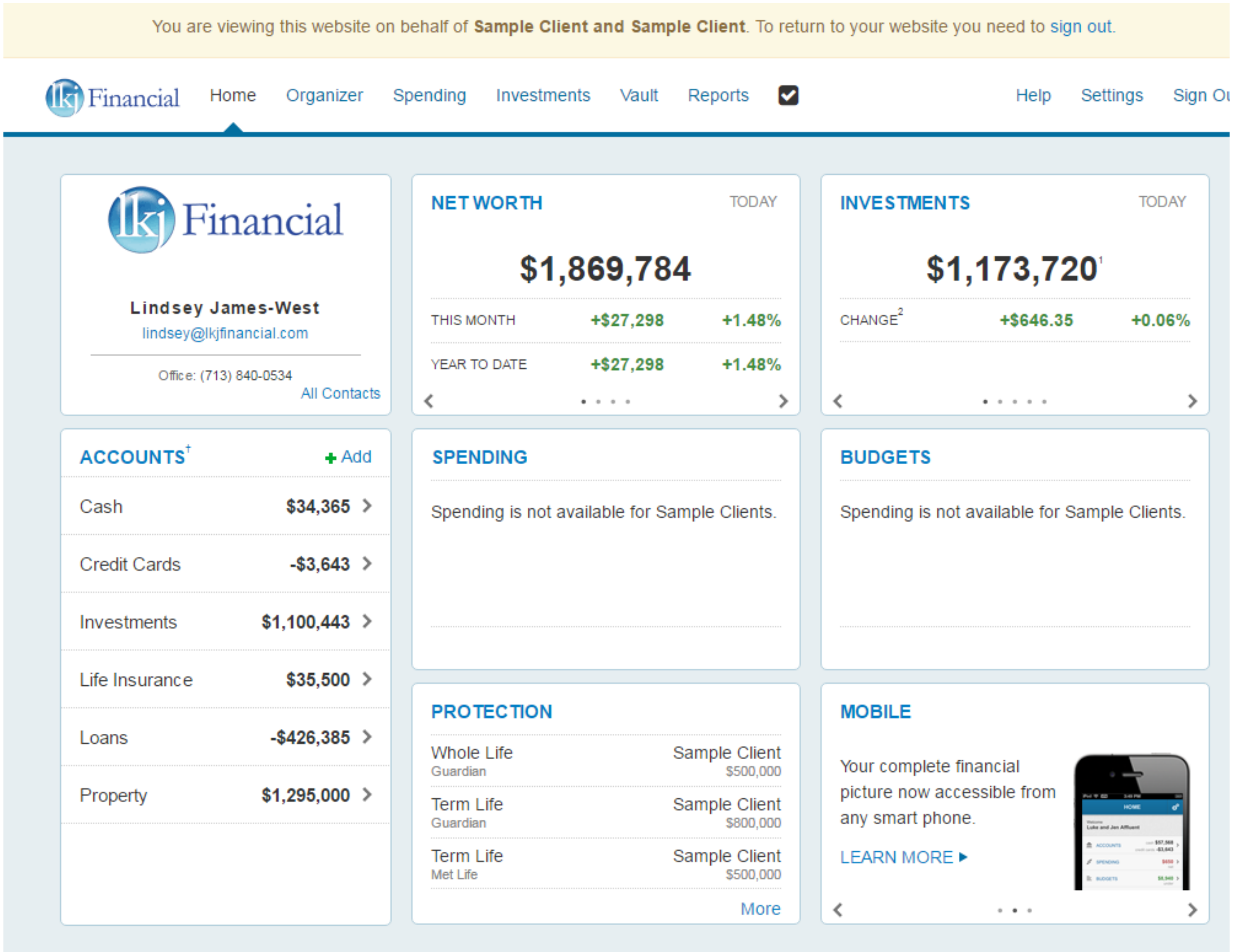
lkj Financial

Lindsey James-West
(713) 840-0534
lindsey@lkjfinancial.com

If you have already registered for LKJ Wealth Portal Access, you can visit https://wealth.emaplan.com/ema/planmembersecurities/lkjfinancial, where you will be directed to input your user name and password. If you cannot remember your password, you can click on the "forgot password" link to have it emailed to you (you will have to answer a security question). If you cannot remember your username or cannot remember your security question, contact LKJ Financial.



Once you log into your Wealth Portal, your home page have a layout like this (sample home page listed below – not an actual client).



You may link investment accounts (IRAs, 401(k)s, 403(b)s, brokerage accounts, etc.), bank accounts, loans – basically any online investment or liability – to the portal. The site is non-transactional, but gives you a central hub to view all of your accounts in one place, updated in real time.

Please view the LKJ Wealth Portal User Guide for additional information.