

Instructions for www.planmember.com

In order to see your view your account holdings and statements online, you will need to log in to planmember.com.

You may follow the step-by-step instructions below or watch this video: [Account Access Overview](#).

Step 1: Go to www.planmember.com

Step 2: Click on “LOG IN” at the top left of the page:



Welcome to PlanMember Online

Member Login

Please enter your username and password to log in.

Login

Forgot your password? [Click here to reset your password](#)

Forgot your username? [Click here to retrieve your username](#)

First time user? [Click here to login](#)

For assistance call (800) 874-6910
Monday - Friday 6:00 a.m. to 5:00 P.M. (PST).

To learn more about the Benefits of Membership, visit planmember.com or call (800)874-6910

*Need more assistance?
Watch the brief tutorial:*

[Account Access Overview](#)

Step 3: If you have a PlanMember account, you can log in using your username and password or click “Forgot your password?” or “Forgot your username?” if you need a reminder for either. If you are a first time user, click “First time user? Click here to login.”

Step 4: If you are a new user, you will be asked to verify your identity.



Welcome to PlanMember Online

Is This Your First Time Here?

Please fill in the fields below to start the account creation process.

SSN:	<input type="text"/>	Show
Birthdate:	<input type="text" value="MM/DD/YYYY"/>	
Zip Code:	<input type="text"/>	

Begin

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[Back to Login](#)

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Step 5: You will then be asked to create a user name and then a password



Welcome to PlanMember Online

Choose a Password

Please choose the password you would like to log in with. As a safety precaution, your password must meet our minimum security requirements as follows:

- Minimum of 8 characters
- At least one capital letter
- At least one number

<input type="password" value="....."/>
<input type="password" value="....."/>

Change

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[Account Access Overview](#)

Step 6: Once you are logged in, you will land on your home page. To access your account information, click on “my account” on the upper left, gray navigation bar.

PlanMember SERVICES
Planning your future...today®

Lindsey James-West
PlanMember Financial Professional

HOME ABOUT SUPPORT CONTACT SEARCH LOG OUT

A Proven Approach to Retirement Planning

My Account Programs & Services Planning Get Started



Lindsey James-West
PlanMember Financial Professional
P: (713) 840-0534

[email me](#)

Market Watch

Symbol	Last	Chg
DJ Industrial Avg	19963.80	64.51
NASDAQ	5521.05514	33.11977
S&P 500	2276.98	7.98

Jan 07 2:15 PM EST

One of the biggest challenges we face in life is to plan for retirement and grow our net worth.

As a financial planner and managing partner at LKJ Financial, Lindsey enjoys helping individuals, families and business owners reach their financial, retirement and estate planning goals. She has built a reputation as a personally-engaged problem solver who provides exceptional customer service. Working with other advisors, attorneys, tax professionals and caregivers, her approach is inclusive, transparent and education-based.

Whether focusing on wealth accumulation or wealth distribution and preservation, she strives to help her clients simplify the complex financial world so they can focus on what they value most.

As an independent advisor with PlanMember, Lindsey's clients can choose from a broad spectrum of **investment options**, including professionally managed mutual fund accounts and insurance programs. Her clients also enjoy the **Benefits of Membership** through the **PlanMember Services Program**, a comprehensive retirement planning system designed to help take the mystery out of saving for retirement.

The Latest from MemberMinds



The Importance of Beneficiary Designation [WATCH]

Refer a Friend

Online Retirement Plan Review

Get your complimentary retirement plan review.

For specific questions about PlanMember's online site, please contact PlanMember at: 800.874.6910 and one of their specialists will help you.