



Client Reference Card

# Welcome to the Cambridge Connection Client Portal



Secure method for viewing information from Cambridge Connection.

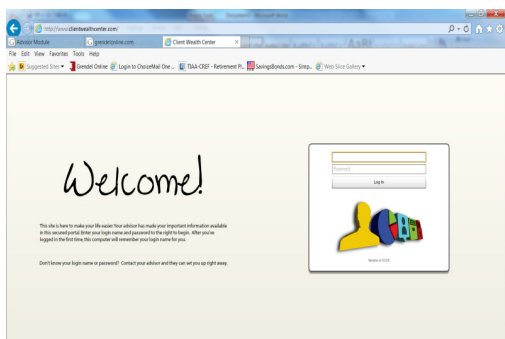
Safe and secure method to upload your files to Cambridge Connection without the need for password protection.

*\*Note: Using the client portal is safe and secure. Email is not secure -- to protect your identity, never include confidential information within the body of an email or within email attachments unless they are password protected or encrypted.*

**First Time Users:** Email received from Cambridge Connection, Inc. with User Name and Temporary Password. Please go to the Cambridge Connection website and click the link to the Client Portal.

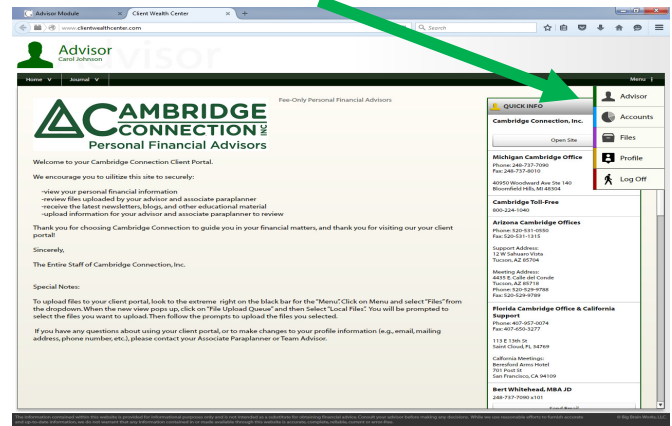
[cambridgeconnection.com](http://cambridgeconnection.com)  
(or directly to clientwealthcenter.com)

**Note:** It will take approximately 10 seconds to load the secure website login page.



**Logging Out:** You may logout, or the system will automatically log you out for inactivity. Refresh or Close browser before attempting to log in again.

Use drop down menu on right to navigate through the portal.



## Uploading Files

**Note:** Secure upload, no document password required.

1. Select **Files** from drop down menu
2. Click **File Upload Queue**
3. Click **Select Local Files**
4. Browse to file & click open
5. Click on the document then click on Begin Transfer
6. Click Yes to finish uploading the document

## Adding Accounts (Web Feeds)

**Note:** Use grey menu bar to respond to questions.

1. Click **Accounts**
2. Click **External Feeds**
3. Click "I Agree" (first time only)
4. Click **Add New Account**
5. Follow the prompts
  - a. Search the institution
  - b. Highlight the correct institution
    - i. Click **Use Selected Institution**
  - c. Input login information
    - i. Click **Use These Credentials**
  - d. Answer security questions as prompted
    - i. Click **Use These Answers**
  - e. Click to highlight and select the accounts you want to set up
    - i. (highlight all if you have input multiple accounts)
  - f. Click **Finish – Create Accounts**



Thank you for using the Cambridge Connection Client Portal

[cambridgeconnection.com](http://cambridgeconnection.com)

Need help? Call your Cambridge Associate or call 800-224-1040