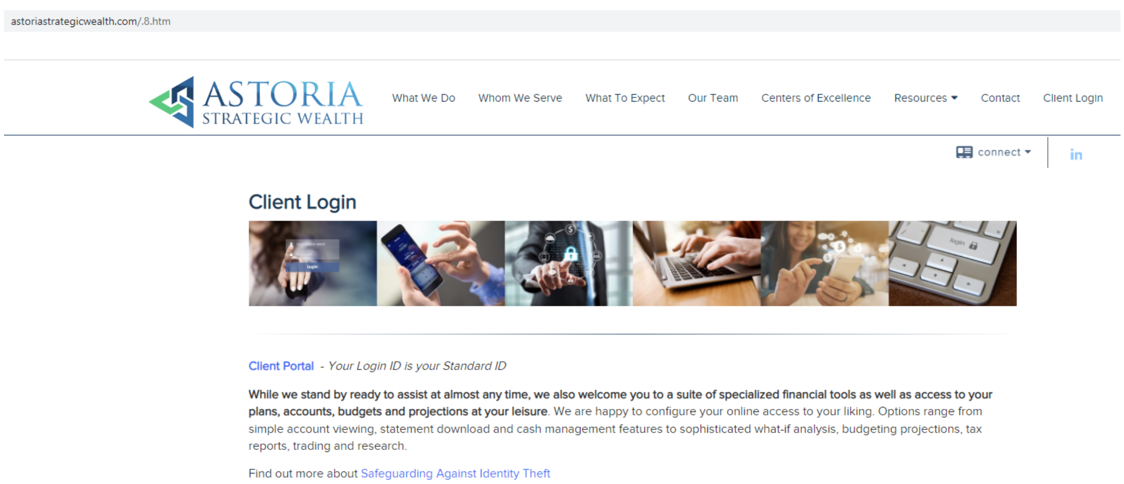
Accessing your Client Portal

Recall that our portal, released in 2018, provides single sign-on access to your financial plan and live net worth updates (MoneyGuidePro), Sharefile (your document vault), quarterly reports from our firm, statements and tax documents from TD Ameritrade or Schwab, as well as account activity, holdings, performance, etc.

To Access your Client Portal

- Click on the Client Portal link from our website: https://www.astoriastrategicwealth.com/.8.htm



- Your Login ID is your ASW Standard Login typically in the format of <lastname><firstinitial><first initial>. As an example, a couple with the names of Jake and Stephanie Lakeland would have a Login ID of lakelandjs (Note: Your login ID is NOT your email address).

- Your password is your standard password with us unless you have changed it. If you have forgotten your password or are having trouble logging in, please reach out to any of us.