



Provide Read Only Account Access to Your Financial Advisor

Follow these simple steps if you wish to provide your financial advisor with read-only access to your Max account. By enabling your advisor to view your cash balances, they will be able to provide you with more holistic advice to help you manage all aspects of your portfolio.

Adding your financial advisor to your Max account is as easy as entering their email address. You can do so upon initial Max account setup, or later on by updating your Profile page.

New Members:

- When you create your member profile, you will be offered the option to add your financial advisor at the bottom of the screen

Create Your Member Profile

☒ I would like to give my financial advisor read-only access to my account balances. (optional)

- Check the box next to "I would like to give my financial advisor read-only access to my account balances"
- The window will expand so that you may enter your advisor's name and email address

FINANCIAL ADVISOR (OPTIONAL)

To facilitate your personal financial planning, you may choose to give your financial advisor read-only access to your personal and financial information held by Max. This may include, without limitation, your name, email address, linked account balances, current optimization status and settings, and 1099-INT statements. You may revoke your consent at any time by unchecking the box below.

Advisor's First Name

John

Advisor's Last Name

Anderson

Advisor's E-mail Address

john@advisor.com

☒ By checking this box, I hereby accept and agree to be bound by the terms and conditions of the **Max Client Account Addendum - Information Sharing.**

(optional)

- Check the box next to, "I hereby accept and agree to the terms and conditions of the Max Client Account Addendum - Information Sharing"
- Click the "next" button at the bottom of the page, and your advisor will be granted read only access

*If at any point you wish to revoke access, navigate to your **Profile** page, delete your advisor's email address or uncheck the consent box and click "Save Your Edits" to confirm the change.*

Existing Members:

- You may provide your advisor read only access to your Max account at any time by logging into Max and clicking on the "Profile" icon at the top of the screen (pictured below)



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Invites 4 **Profile** Donate Logout

- You will be taken to the "Edit Your Member Profile" page
- At the bottom of the page, you may enter or update your advisor's name and email address
- Check the box next to, "I hereby accept and agree to the terms and conditions of the Max Client Account Addendum - Information Sharing"
- Click the "Save Your Edits" button, and your advisor will be granted read only access

Edit Your Member Profile

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(optional)

Save Your Edits

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