

# North Star's Client Portal – Set up & Access



## How to access for the first time

North Star will send you an email (from Black Diamond) to setup your client portal. The email will look like similar to:

From: Black Diamond <noreply@bdreporting.com>  
To: youremail@...  
Subject: New User Setup for North Star's client portal – PREVIEW

Dear client,  
Welcome to North Star's client portal. We created a new username (xxxxxx) for you to view your portfolio.

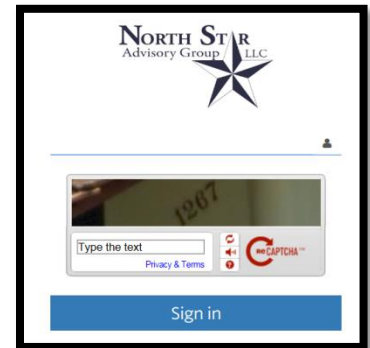
Please click on the following link to set up your account:

**This is a temporary link and will expire in 7 days.**

Best regards,  
North Star Advisory Group

- 1) Click on the link to “Set Up Account”
- 2) Enter your Username:  (provided by North Star in the email)
- 3) Type the text into the box displayed in the CAPTCHA image.
- 4) Click on “Sign in”
- 5) Scroll through to read the terms of use and click on “Accept”
- 6) Select three challenge questions, enter your answers and click on “Next”
- 7) Set your new password and click on “Save”

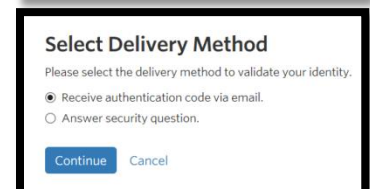
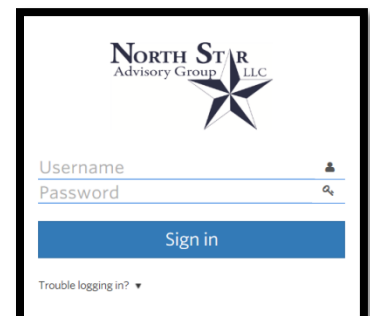
Password Requirements: 8 characters including numbers, characters upper and lower case letters  
You will receive a courtesy email that your password has been updated.



## How to access after the initial set up

The following is the step-by-step process to set-up your NSAG Client Portal:

- 1) Visit: [www.ns-ag.com/account-logins/](http://www.ns-ag.com/account-logins/) (book mark this page for future reference, you will be using other links from this page)
- 2) Click on the box for “NSAG Client Portal”
- 3) Enter your Username:  (provided by North Star)
- 4) Enter your Password:  (created by you)
- 5) Click on “Sign in”
- 6) For security, you may have to authenticate your access via a code or answer your security questions.





# Adding Outside Accounts (Assets & Liabilities)

NSAG has the ability to intelligently aggregate and analyze financial account data in a more usable format from multiple institutional sources. This cutting edge secure digital connection will provide a 360-degree view of client finances, spending, enriched analytics and held-away accounts.

The following is the step-by-step process to add your outside assets and liabilities to your NSAG Client Portal:

- 1) In the upper right hand corner of the web page, click on the “+ Account” to the left of your name



- 2) Click on View Terms of Use
- 3) Scroll through to read the terms of use and click on “Accept Terms”
- 4) Click on “Add Account”
- 5) Enter the name of the institution in the search bar



Did your search return too many financial institutions to choose from?

- Try looking at the URL (web address) you typically visit to one of the ones listed.

If you do not see your financial institution, either:

- a) Try typing a shortened version of the company (e.g. “North Star” instead of “North Star 401k”)
- b) Send an email to North Star ([info@ns-ag.com](mailto:info@ns-ag.com)) with:

Subject: Outside Account  
Body: Name of institution & URL of the page you normally would go to

- 6) Enter your username, password and click on “Sync Brokerage”  
It may also prompt you to answer authentication questions for the institution you are linking to.  
Be patient, syncing can take a while.
- 7) Once the sync is successful, you should immediately see the accounts listed in My Accounts.  
In 3-5 business days the new outside account(s) will start to show in your dashboard cards. If you do not see them, contact North Star.

By default, North Star will set your outside accounts to the following view options:

View Options	Allocation	Performance	Activity	Projected Income	Fixed Income	Transactions	Net Worth
1) Investment	✓	✓	✓	✓	✓	✓	✓
Examples include but are not limited to brokerage accounts, 529s, 401k, 403b, annuities, CDs, HSAs...							
2) Banking*	✓						✓
Examples include but are not limited to checking and saving account.							
3) Liability							✓
Examples include but are not limited to credit cards, auto, mortgages, student loans...							

\*If you would like transaction level detail within our portal for any banking account, contacting North Star and request to have the view option changed for that particular account. However, this may add a lot of additional details to the transactions card.



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