# ClientConnect: Client Frequently Asked Questions

**What is ClientConnect?**
ClientConnect is your online portal to view your accounts, statements, etc. in one place. You can send or receive messages and files from your Advisor securely.

**How is it different from Online Access?**
Online Access is limited to brokerage accounts only, whereas ClientConnect isn’t.

**Should I stop using Online Access website?**
It is your choice. Note that ClientConnect does not offer online (self) trading.

**What is the URL for ClientConnect?**
https://client.hdvest.com

**Is ClientConnect accessible on mobile devices?**
Yes. You can access ClientConnect from all your devices, including smart phones and tablets, using the browser.

**Is there a mobile app for ClientConnect?**
The ClientConnect free mobile app is available on both Apple and Android devices. You can download the app on the Apple Store or Google Play.

**What do I do if I am having trouble signing up?**
Your information may not match with what we have in our systems. Call your Advisor to update the information.

**How do I change my phone number on file for ClientConnect?**
For security reasons, only your Advisor can change the phone number for you. Please speak to your Advisor.

**I have a joint account, but I do not see it. Why?**
Your primary joint account holder would have to create a ClientConnect account and share the account with you using the Manage Access feature available on the site.

**I am not seeing all of my accounts. Why?**
We rely on third party data sources to provide us with your account data. Please speak to your Advisor so they may notify us.

**I am unable to view my consolidated brokerage account statement. Why?**
Your consolidated brokerage statement is householded with other accounts that you do not have access to. However, you can still access the individual brokerage statement that belongs to your account.

**I am unable to view my Quarterly Performance Report. Why?**
Your Quarterly Performance Report is householded with other accounts that you do not have access to. Please ask the accountholder to grant you access to view those accounts by logging into ClientConnect and using “Manage Access” feature. Note that the other accountholder must have the ClientConnect portal login set up to do this. Your Advisor will not be able to do this for you.

**I am not seeing any of my accounts. Why?**
Try to access your account again later. If the issue doesn’t resolve automatically, please speak to your Advisor. Your Advisor’s access to our systems may be experiencing issues.

**I would like to share my accounts with some other person. Do I need to fill out paperwork?**
No. You can electronically share the account using the Manage Access feature available underneath the gear icon (top right corner of the page) on the ClientConnect website.

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**Can I share my email address with someone else to register to portal?**
No. Client must have their own email address to register to portal.

**Can a business register to ClientConnect?**
Yes, but the business must have its own email address.

**How can I view my children's accounts (e.g., 529)?**
If you are a primary account holder, you should be able to see your children's accounts in your portal.

**I am seeing some other accounts that don't belong to me. Why?**
That is because the account holder has shared those accounts with you. Tell that person to remove your access to stop sharing. If this is not the case, notify your Advisor right away.

**I do not see the messages and files that I shared or my Advisor shared with me. Why?**
Messages and shared files are permanently deleted from the system after 90 days. If you are not seeing messages and files inform within the last 90 days, please contact your Advisor for assistance.

**Why does ClientConnect keep asking for the token code to login?**
Click the checkbox that indicates you want to remember the browser while logging in. It won't ask for the code for 90 days. Do not check this checkbox on public devices.

**Why do I have to recognize and select images during the signup process?**
This will prevent robots from registering on the site.

**I have accounts with multiple Advisors, but I can see accounts only under one Advisor. Why?**
This situation is highly uncommon, but you would have to register a separate ClientConnect account for each Advisor using a separate email address. Use the Manage Access feature to share accounts that you would like to view together.

**Can I turn off paper statements through the portal?**
At this time, you are unable to turn off paper statements in the portal. Please continue to use the existing procedures in place today to turn off paper statements. Please call your Advisor if you need assistance.

**I am outside the U.S. Can I access ClientConnect?**
For security reasons, we do not allow access outside of the US.

**I want to share what I am seeing with my Advisor. How do I do that?**
Click the click the gear icon in the top right corner and select "send a screenshot to your Advisor." It takes a picture of the webpage you are on and attaches it to a message. You can send that message to your Advisor securely.

**I have a question. Who do I call?**
Please call your Advisor.