Portfolio Management Services

Through the use of electronic signatures, we are able to accomplish the vast majority of our clients operational needs including opening and transferring accounts, linking bank accounts, and making online contributions and withdrawals. Some of these tasks can be completed though online access as well. Below are links to gain online access:

- If you have accounts at SEI Trust Company, you can set up online account access here: www.accessmyportfoilo.com

- If you have accounts at Charles Schwab, you can set up online account access here: www.schwaballiance.com

Review Meetings and Financial Plan Updates

We are still holding **client meetings**. We use the Cisco Webex conferencing program to communicate (audio or video) and share documents during the meeting.

Secure Document Transfer

We can securely send and receive sensitive documents (we will send you instructions when necessary).

Phone & Voicemail

We have full access to our phone system from home, so we attempt to answer all calls during business hours. If we miss your call, feel free to leave a message and we will provide a timely response.

Mail

We are not completely virtual! We still check the mail and perform tasks in the office when necessary.

We are striving to provide the advice and support you deserve as our clients. Please let us know if you have any needs or concerns. While we look forward to resuming in-person meetings in the future, these online tools allow us to remain fully operational during this time.

Hallett Advisors