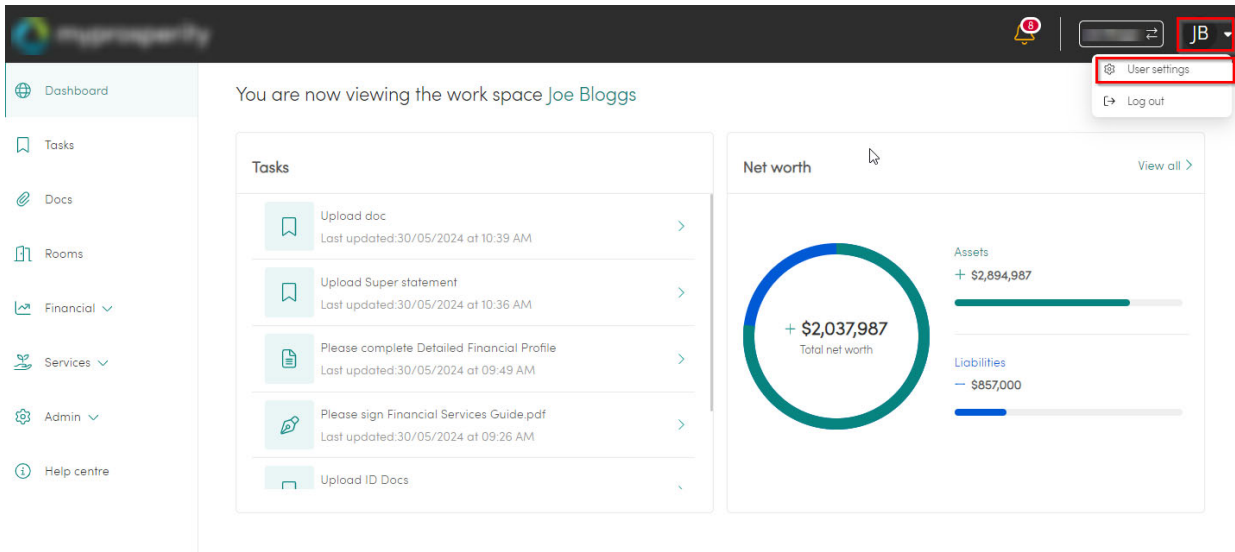


How to change my email address

Your login email address (which also serves as your username and primary contact information) can be updated in the Details area of your wealth portal.

To change your email address:

1. Your login email address (which also serves as your username and primary contact information) can be updated in the Details area of your portal.
- 2.
3. **To change your email address:**
4. In your client portal, Click the arrow next to your profile picture and select 'User Settings' from the drop down.



The screenshot shows the Collins Financial Group client portal dashboard. The user is logged in as Joe Bloggs. The dashboard includes a sidebar with navigation options: Dashboard, Tasks, Docs, Rooms, Financial, Services, Admin, and Help centre. The main content area displays a 'Tasks' list and a 'Net worth' summary. The 'Net worth' section shows a total net worth of +\$2,037,987, with assets of +\$2,894,987 and liabilities of -\$857,000. A dropdown menu is open next to the user's profile picture (JB), showing options for 'User settings' and 'Log out'.

Task	Last updated
Upload doc	30/05/2024 at 10:39 AM
Upload Super statement	30/05/2024 at 10:36 AM
Please complete Detailed Financial Profile	30/05/2024 at 09:49 AM
Please sign Financial Services Guide.pdf	30/05/2024 at 09:26 AM
Upload ID Docs	


Category	Value
Assets	+\$2,894,987
Liabilities	-\$857,000
Total net worth	+\$2,037,987

5. Select Account settings >Change email.

Dashboard > User settings

User settings

Account settings Security settings



Full name
Joe Bloggs

Email(login) [Change email](#)

johncitizen1@mydemo.com

Password [Change password](#)

Deactivate account

Once you deactivate account, your data will be deleted within 10 days of your request. Account deletions are final and cannot be undone. Should you want to use the wealth portal in the future, you'll need to create a brand new account: all previously entered information such as overall net worth, property details, and personal documents will be lost.

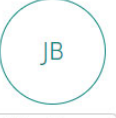
[Deactivate account](#)

6. Enter your **new** login email address and current password, then click 'Save changes'.

Dashboard > User settings

User settings

Account settings Security settings



Full name
Joe Bloggs

*** Email(login)** *** Password**

Please enter your new login email

[Cancel](#) [Save changes](#)

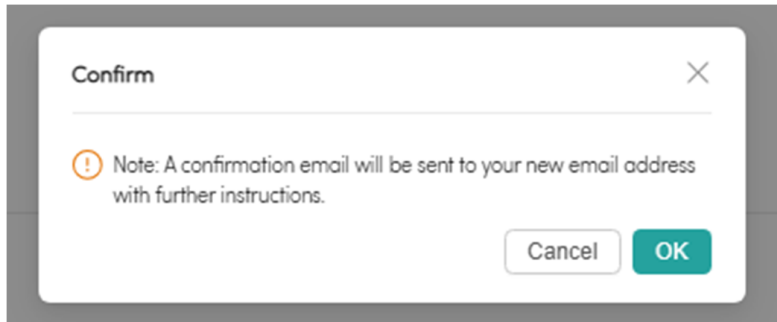
Password [Change password](#)

Deactivate account

Once you deactivate account, your data will be deleted within 10 days of your request. Account deletions are final and cannot be undone. Should you want to use the wealth portal in the future, you'll need to create a brand new account: all previously entered information such as overall net worth, property details, and personal documents will be lost.

[Deactivate account](#)

7. To ensure the security of your account, this triggers a confirmation process. An email will be sent to your **new** email address.

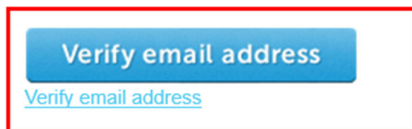


8. Locate the confirmation email and click on the link.

Hi **Alana**,

You have requested to change the log in email address for your wealth portal.

Click on the link below to verify your **new** email address.



Once verified, please use this address to log in to your wealth portal.

9. The link takes you to the portal login screen where you can use your **new** email address and existing password to access your account.

Welcome


Log in to access your portal

Email Address

Continue

Don't have an account? [Sign up](#)

OR

 Continue with Google