Step-by-Step Instructions to Create Your Online Client Account

Are you registered with Wealth Strategy U?
If you are already registered with Wealth Strategy U, you can take a short cut. Login to Wealth Strategy U and select the "**Upgrade Account**" option on the left navigation menu. Then skip to Step 3 of these instructions.

Step 1
Go to **www.ProVisionWealth.com** and select the Client Login tab.

Step 2
Select "**Create Client Account**" in the Client Login box.

Step 3
Complete the Client Registration fields and submit your input.

About your account number
Your account number can be found on a recent invoice. Your account number is a 5 or 6 digit number. Your account number will start with a 1, 2 or 3.

You will have an account number for your individual account and an account number for each of your entities. Once you have registered with one of your account numbers, you can add your additional account numbers.

Don't know your account number? Click on the "**Request help**" link located on the registration page to send a request for your account number(s). Your account numbers will be emailed to you only if the email address provided in the request matches our records. If the email address provided does not match our records, we will contact you at the email address in our records to verify the request.

Step 4
Your online client account has now been created.

Step 5
Now that your online client account is created, you can link to your individual and/or entity accounts.

If the account number used in Step 3 matched our records, then you can access this account number under "All Accounts" on the left navigation menu. If our records didn't match, then you will receive an email once you can access this account number.

To learn more about what you can do with your online account, including adding additional accounts, go to the FAQs located on the left navigation menu while you are logged into your online client account.