



Hello,

Shore Financial Planning utilizes a software called PreciseFP to easily and securely collect and organize sensitive client information. This software has security measures to keep your information safe and out of reach, but there are a few steps you need to take in order to do so. This template will walk you through how to finalize setting up your account as well as help make sense of our process.

We look forward to working with you and developing a lasting relationship!



Account Setup

At this time, you currently have your own account set up in PreciseFP with information we have obtained:

- Your Name
- Phone Number
- Email Address
- Co-Client Information

However, your account is only set up to be able to submit low-level security information. In order for us to accurately understand your current financial situation, you will need to become a high-level security account.

So what does that mean?

The next time you are sent a high security template, after opening it, you will be greeted with a screen that looks like this:

You will need to enter the phone number you signed up with, and once you click verify, you will have a security PIN texted to your phone number and will see a screen like the one shown in the following image.

Enter the security PIN that was texted to you exactly as it is shown on your phone. Once this is done successfully, you will be prompted to create a password.

Once you create your password, your account will become a high-level security account and allow you to submit all of your financial information worry-free. This password will be used in the future for every high-level template you open.



You will need to use your password multiple times throughout your time working with us, but if you forget it, it can always be reset. Here's how.

When asked for your password, click on the "Forgot your password?" link.

Clicking on that link will bring you to the following page, where you will once again be asked to input your phone number. Once you do, the process you endured to initially set up your password will repeat.

You will input your phone number, input the PIN number that was texted to that phone number, and then proceed to reset your password.

Please refer to the prior page for further detail on these steps.



Once again, we thank you for choosing Shore Financial Planning. We look forward to working with you and helping you find financial peace of mind! As always, if you have any questions please don't hesitate to reach out to us.