



Account Setup Guide

The DVI Client Portal provides a secure, centralized view of your complete financial picture. It allows for the secure upload of documents, whether for sharing with your team or storing for your own confidential records.

If you need assistance with setup:

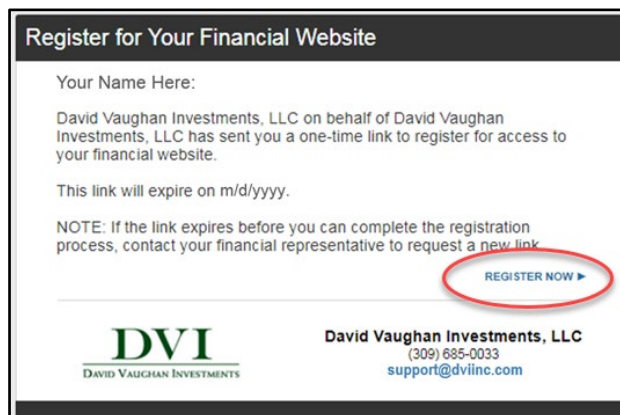
- You can reach out to your Relationship Manager, or
- Call our office at (309) 685-0033 and you'll be connected to a team member who can help.

Step 1: Check your email

**Link expires after one week. Please contact your DVI Team if you need a new invitation link generated.*

When your Portal account is ready, you will receive two emails:

- An email from a DVI Associate with more details about setting up the account through eMoney.
- An email from notification@emoneyadvisor.com with a one-time link* to access and register your account:

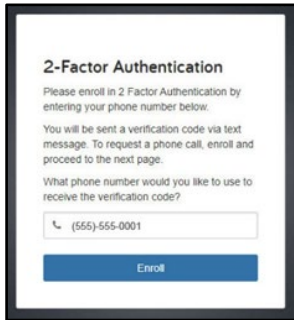

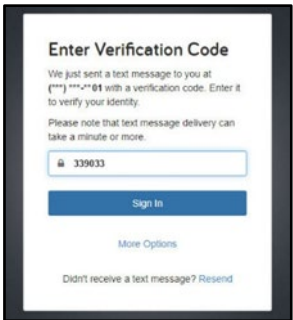

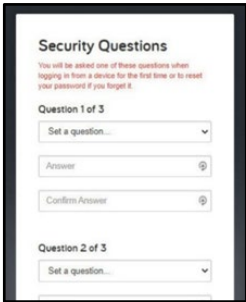

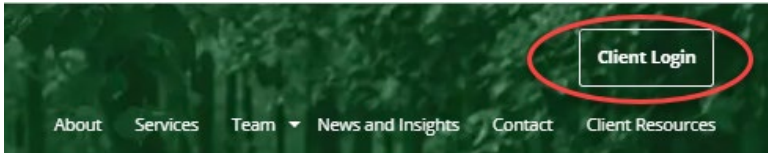


Step 2: Register your account

Use the eMoney link and follow the prompts to choose your username and password.

- eMoney uses your email as your default username, but you can choose a different one. Once set, your username can't be changed without deleting and recreating your account.

Continued on next page.

<p>Step 3: Two-Factor Authentication</p> <p><i>*Contact your DVI Team if you want to set up 2FA with a landline.</i></p>	<p>Two-Factor Authentication (2FA) provides extra protection for your confidential financial information.</p> <div data-bbox="378 323 669 640">  </div> <div data-bbox="727 323 1101 640">  </div> <div data-bbox="1159 323 1450 640">  </div> <ol style="list-style-type: none"> 1) Enter your cell phone* as your primary authentication number. 2) Check your phone for a text message containing a 6-digit code. 3) Enter the code into the form field and click "Sign In."
<p>Step 4: Finish security setup</p>	<ol style="list-style-type: none"> 1) Choose and enter a recovery phone number: <div data-bbox="534 884 760 1184">  </div> 2) Choose and answer three Security Questions: <div data-bbox="1143 884 1386 1184">  </div>
<p>Step 5: Agree to eMoney's Terms of Use</p>	<p>Read the Terms of Use. Once you click "I Accept," you will have full access to your DVI Client Portal.</p> <div data-bbox="748 1283 984 1619">  </div>
<p>Step 6: Logging in</p>	<p>Once set up, you can access your Portal anytime by clicking Client Login at the top of www.dviinc.com:</p> <div data-bbox="537 1751 1300 1902">  </div>