

Client Account Portal Instructions

At Golden Reserve, we want to provide you not only world-class service but provide you with world-class technology. You are not required to utilize any of the following options, but as a package client they are available to you.

When you visit goldenreserve.com, you will see a link at the top of your screen named 'Client Login' – this link we provide you with four options.

1 – Schwalb Activity – this will be a direct log-in to your Charles Schwab account – from there you can see account balances and activity

2 – Client Portal – this will be an account aggregator which you can link all your banks and other financial institutions to see all your account balances in one place (instructions below for access)

3 – Add Accounts – if you want to add additional accounts to your Client Portal – this link will provide you access (instructions to add accounts below)

4 – Client Account Online Instructions – is a downloadable pdf of this instruction sheet

Client Portal Access

- Initial Login
 - Access the auto-generated email from no-reply@alerts-morningstar.com
 - Click the sign in button
 - Complete required registration information
 - Once logged in, you will see your Charles Schwab account(s)
- Login Process
 - Go to goldenreserve.com – go to Client Login link – and select Client Portal
 - Enter username and password
 - You should see the Charles Schwab account(s) and any other accounts you have added

Add Accounts

- Initial Login
 - Access the auto-generated email from BAA-Service@alerts-morningstar.com
 - Click on the “Log In” Hyperlink
 - You will be prompted to change password
- Login Process
 - Go to goldenreserve.com – go to Client Login link – and select Add Accounts
 - Enter username and password
- How to Add an Account
 - Login
 - Select “Link an Account”
 - Search for the financial institution(s) you would like to link
 - Example: To link your Chase Bank account, search “Chase”
 - Enter your login credentials for that account

- If 2 step verification has been enabled, you may need use a text message or email to complete
- Once verified, the account will appear in Client Portal – this could take up to 48 hours
- Repeat for any additional accounts you would like to link

If you have any issues or questions, please contact your team at Golden Reserve for support.