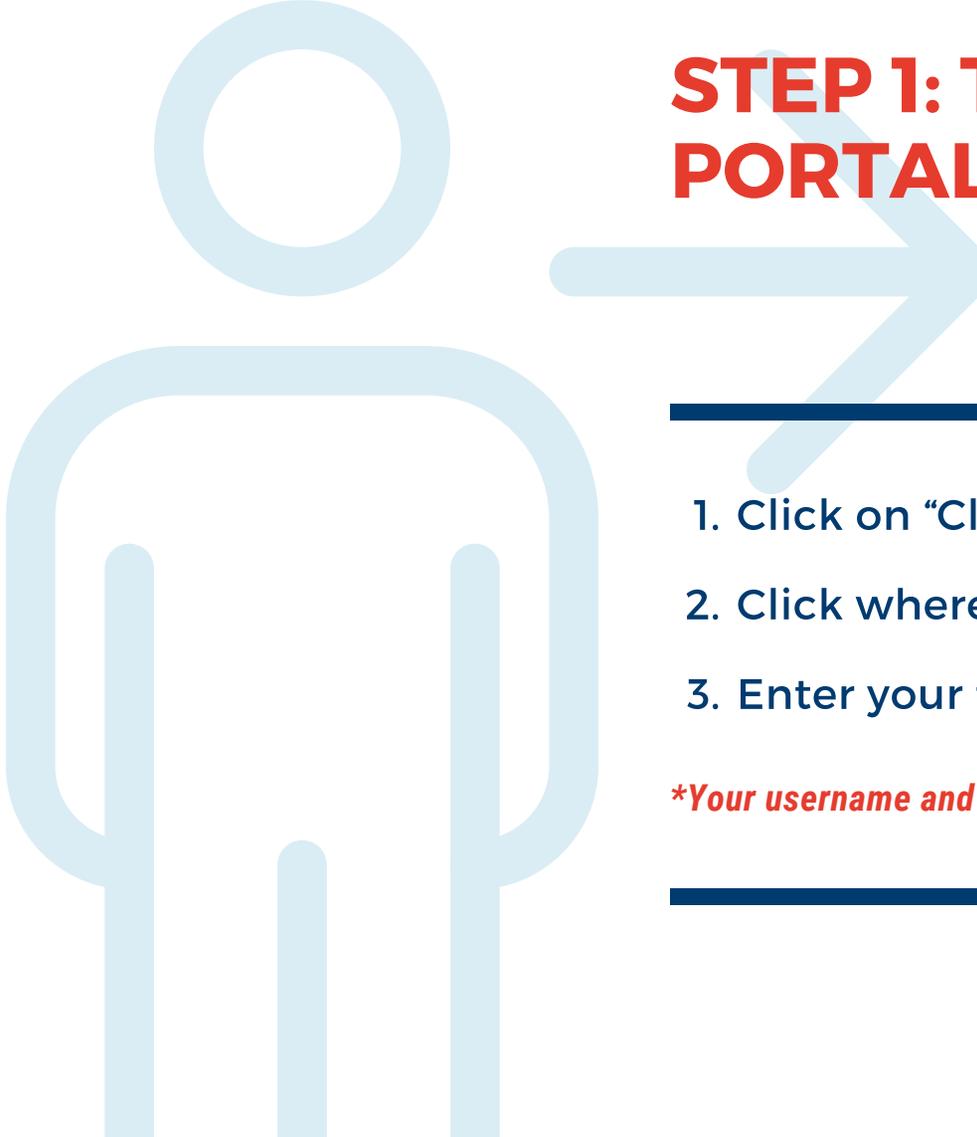


**BLUESKY WEALTH ADVISORS**

**GETTING  
STARTED  
OVERVIEW**

The BlueSky client portal is a robust platform that has been designed to enhance your client experience. It integrates with our sophisticated planning tools to deliver real-time portfolio information, aggregates all assets and liabilities to track overall net worth and provides a means for securely sharing confidential information.



## **STEP 1: TO ACCESS YOUR PORTAL VISIT OUR WEBSITE**

**[www.blueskywa.com](http://www.blueskywa.com)**

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1. Click on “Client Login” at the top right on screen
2. Click where it says "Click here to access your portal"
3. Enter your temporary username and password:

***\*Your username and temporary password sent tp you via text message.***

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Risk tolerance is essentially how much risk one is willing to take on where their investments are concerned. Everyone's risk tolerance is going to be different. We use a 25-question Risk Tolerance Questionnaire to help us determine your individual attitude involving financial risk.

## **STEP 2: TAKE RISK TOLERANCE QUESTIONNAIRE**

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1. Log on to your BlueSky Client Portal
  2. Click the "Planning" tab (found in blue bar at top of page)
  3. Click on " Access Plan Details" (found on far right side of page)
  4. Click on the the "FinaMetrica Risk Tolerance" button
  5. Click on the "Complete Your Questionnaire" link. There is a separate link for each client to access their own questionnaire.
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# STEP 3: PROVIDE COPIES OF APPLICABLE DOCUMENTS

The following documents are necessary for us to get a complete picture of your financial situation and to better serve you in the planning process.

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Use the link provided in your welcome email to securely upload the documents. Not all items will be applicable to your situation.

## 1. Personal Information:

- Photocopy of driver's license/government-issued ID
- Voided Check from primary checking account (sets up electronic link to easily transfer funds between checking and Schwab brokerage account)

## 2. Investments:

Please provide the latest statement for all investment accounts.

- Stock, bond, or mutual fund accounts
- Restricted Stock Units (RSUs), Employee Stock Purchase Plan or Stock Options
- Annuities

## 3. Retirement Plans:

Please provide the most recent statement and beneficiary information from the following retirement accounts, if applicable:

- IRAs (all types)
- Employer-sponsored plans (401k, 403b, Thrift Savings Plan, etc.)
- Profit Sharing Plan
- ESOP
- Deferred Compensation Plan
- Defined Benefit Pension Plan

#### 4. Tax:

- Personal Tax Returns (last tax year filed)
- Payroll stub showing year-to-date earnings
- Business Tax Returns, if applicable (last tax year filed)
- K-1s received for all business entities, if applicable

#### 5. Estate:

Please provide copies of the following:

- Trusts
- Wills
- Powers of Attorney
- Healthcare Powers of Attorney
- Living Wills

#### 6. Personal Assets:

Please provide a list showing the current market value for each of the following:

- Primary residence and/or other real estate
- Automobiles, boats, etc.
- Personal property of significant value (furniture, jewelry, art, etc.)

#### 7. Insurance:

Please provide policies and any current policy statements/reports for each of the following, if applicable:

- Life insurance
- Healthcare/Disability Insurance
- Property/Casualty Insurance
- Long-Term Care Insurance

#### 8. Other Items:

- Monthly expense records/budget/cash flow information. (If you do not currently have a method of tracking your expenses, we can provide a spreadsheet for you to use.)
- Employer benefit statements/benefit booklets or other information
- Social Security benefit estimate statement – Create an account on the Social Security Administration website to obtain a statement. [www.ssa.gov/myaccount/](http://www.ssa.gov/myaccount/)
- Credit report – Request a free copy of your credit report at [www.annualcreditreport.com](http://www.annualcreditreport.com)

## 9. Liabilities:

Please provide the original document setting forth the liability, as well as statements showing the most recent balance for each of the following:

- Mortgages
- Car and boat loans
- Personal notes, credit cards, and lines of credit

## 10. Cash and Equivalents:

Please provide the latest statement for each of the following:

- Checking, savings, or money market accounts
- Certificates of Deposit

## 11. Private Businesses:

Please provide copies of the following for private businesses of which you are an active member:

- Market value, if known
- Buy/Sell Agreements
- Bylaws
- Operating Agreements
- Current year Profit & Loss Statement and Balance Sheet
- Prior year Profit & Loss Statement and Balance Sheet if tax returns not yet filed
- Business Plans, if available

## 12. Private Investments:

Please provide cost basis and current value of any private passive investment you own:

- Real Estate
- Oil and Gas
- Venture Capital
- Private Equity
- Other Private Corporate Ownership

## 13. Notes Receivable:

Please provide a copy of the note, record of payments received, and the current balance, if available, for any loans you have made to others:

- Notes Receivable

## STEP 4: BLUESKY & CHARLES SCHWAB

BlueSky has used Charles Schwab as our trusted custodian since the firm was started. The custodian is the independent financial institution that creates your accounts, safeguards your money, and allows BlueSky to manage the accounts on your behalf. BlueSky and Schwab work seamlessly together to provide the best possible investment experience. Schwab's Client Learning Center explains the custodian/advisor relationship and shows you what you can expect as a new client of Schwab.

[Schwab's Client Learning Center](#)

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