

Enhanced Client Portal and KFWA App



“Excellent firms don’t believe in excellence – only in constant improvement and constant change.”

—Tom Peters, author of *In Search of Excellence*

At Klingenstein Fields Wealth Advisors (KFWA), we are always searching for ways to help us improve and better serve you. As part of this continuing effort, we are pleased to introduce our enhanced client portal and new KFWA app.

We encourage you to take a look at the portal by clicking [here](#) or you can go to the Client Login from the KFWA website. Once on the portal, set up your new account access via the following steps:

- **Use your personal email as your User ID**
- **Click on “Forgot Password” to get a temporary password**
- **Once you have logged in, set up a new password**

To get the KFWA app, please go to Google Play if you have an Android device, or the App Store for Apple devices, and search for “KFWA.” Once you have installed the app, use the same User ID and Password that you are using for online access, to log in to the app.

We hope you will find the portal useful and consider going green by electing to no longer receive mailed quarterly evaluations. To do so, contact Susan Curry at 212.492.7000 or email info@klingenstein.com. Susan can also help if you have any other questions regarding using the portal or the app.

Long-term focus

Our focus is on building a long-term relationship with you and your family. We are always striving to enrich your wealth management experience with KFWA and welcome your input and thoughts. For more information or to arrange a meeting, please contact us at (212) 492-7000 or info@klingenstein.com.

Important Disclosures

The FT 300 is one in a series of rankings of top advisers by the Financial Times, including the FT 401 (DC retirement plan advisers) and the FT 400 (broker-dealer advisers).

The Financial Times 300 Top Registered Investment Advisers is an independent listing produced annually by the Financial Times (June 2018). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT’s research. The listing reflected each practice’s performance in six primary areas: assets under management, asset growth, compliance record, years in existence, credentials and online accessibility. This award does not evaluate the quality of services provided to clients and is not indicative of the practice’s future performance. Neither the RIA firms nor their employees pay a fee to The Financial Times in exchange for inclusion in the FT 300.

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