

1 When filling out the Section 2: page 3 of the New Client Account Packet for **FormulaFolio Investments**, you were asked to provide a username and password

User Name and Password

For security purposes, we require that each client have a unique user name and password.

User Name Requirements:

- 8-12 characters and not case sensitive
- Note: You cannot change the username after it is set up

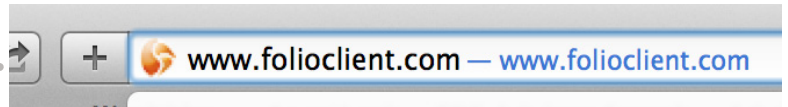
Primary Account Owner User Name	Additional Account Owner User Name

Password Requirements:

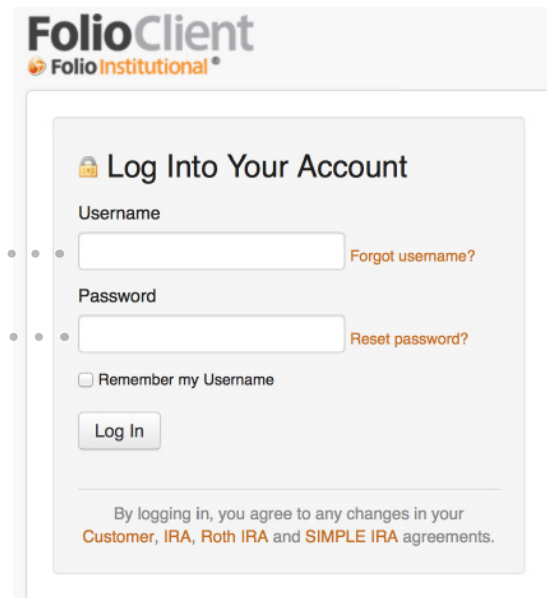
- 10-64 characters
- Must contain one upper case letter and one lower case letter
- Must contain one number or symbol
- Note: Account Owner(s) can change their password at any time on the Settings page

Primary Account Owner Password	Additional Account Owner Password

2 After your account has been opened, you can go to **www.folioclient.com**



3 You will use the same **username** you indicated in the New Client Account Packet. Your **password** will be emailed from Folio to the client.



FolioClient
Folio Institutional

Log Into Your Account

Username [Forgot username?](#)

Password [Reset password?](#)

Remember my Username

By logging in, you agree to any changes in your Customer, IRA, Roth IRA and SIMPLE IRA agreements.