



WATER WALKER INVESTMENTS
CLIENT PORTAL USER GUIDE

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Using Water Walker's Client Portal

Here at Water Walker, we want your experience to be as seamless as possible. To that end, we have created a secure, online client portal so that you can both initiate transactions and check your statement easily and on your own time. This manual will outline how to use the online portal.

How Can I Access the Client Portal?

You can access the Water Walker Client Portal in several ways:

- **By email.** As a Water Walker client, you will receive an email when a new statement or new document becomes available. To access the statement or document, simply click on the link provided in the email to access the client login.
- **Through the Water Walker website.** There is a link to the client portal through our website at www.waterwalkerinvestments.com. Choose "Client Login" from the top menu.
- **By creating a bookmark.** You can access the Water Walker client portal at any time by opening your browser to the Water Walker client portal address <https://wertzyork.com/portal/login-page/>. You may want to bookmark this page for future use.

How Do I Create a User Name and Password?

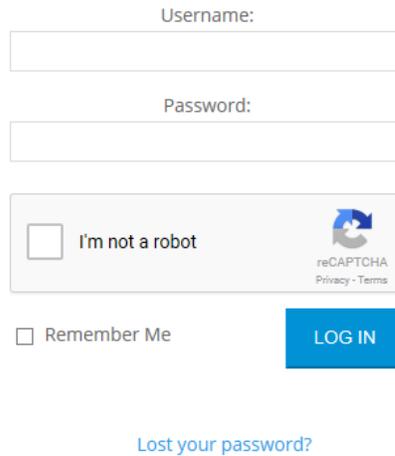
At this time, there is no way to independently create a username and password for the Water Walker Client Portal. Instead, usernames are created when the account is created and emailed to all authorized traders. To create a new user, an organization must submit a letter of instruction on company letterhead, signed by an authorized trader, indicating that a new user may be added to the account. At that time, a username and password for the new user will be sent using the name and email provided in the letter. Please contact Water Walker if you have any questions about adding users to your account.

Usernames

Each user will have a unique user name provided by FL FIT staff. Please keep this username secure as it allows access to all functions on the Client Portal.

How Do I Log Into my Client Portal?

Using the steps provided above, access the client login page. Using the username and password provided to you by Water Walker staff, complete the login form. Click “Log In”.



The screenshot shows a login form with the following elements:

- A text input field labeled "Username:".
- A text input field labeled "Password:".
- A reCAPTCHA widget containing a checkbox labeled "I'm not a robot" and a reCAPTCHA logo with "reCAPTCHA Privacy - Terms" text.
- A checkbox labeled "Remember Me".
- A blue button labeled "LOG IN".
- A blue link labeled "Lost your password?" located below the form.

What if I Have Lost My Username or Password

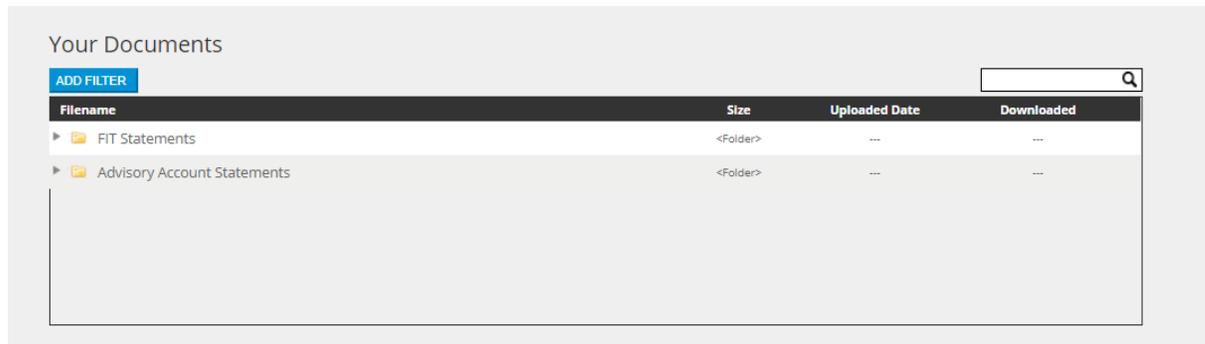
If you have forgotten or lost your username or password, you may click the “Lost your password?” link.

[Lost your password?](#)

If you have lost your username, enter your email. Otherwise, you may enter either your username or the corresponding email to process this request. This link will send you an email that contains a link to reset your password. Your user name will be listed in the email in the salutation. When resetting your password, the password must pass the strength test in order to be accepted. To create a strong password, use letters, numbers and symbols and avoid using recognizable words or dates.

How Do I View My Statements?

Each month, you will receive an email informing you that a new statement has been uploaded to your Client Portal. All statements are loaded in PDF format. To access your statements, log in to the Client Portal. You will find all your statements, and other documents related to your account, under the “Your Documents”.



How to Open a Document

Click on the appropriate header: General or Advisory Account Statements. Click on the document you would like to open. Your browser should automatically open the document and begin to download. Depending on your browser, you may be asked if you would like to open or save the file. You may do either depending on your intended use.

How to Print a Document

To print a document, download it as described above. From there, click CTRL + P to print from the Adobe Reader.

How Do I Send a Message to Water Walker?

Communicating with Water Walker through the web couldn’t be easier. First, you can always send a message directly to info@waterwalkerinvestments.com. Also, you can use the online contact sheet to contact Water Walker staff. It can be found on the menu on the top of each of the web pages.

From your Client Portal, you can also send a private message. Simply add your message below the “Private Messages” header. Select any member to send your message. A history of your private messages will be kept in your portal for easy review.

Private Messages

NEW | **Inbox** | Sent | Archive | Trash

To *
Select one member will create a Dialogue, selecting multiple members will create separate message threads

Subject *

Message *

SEND MESSAGE | CANCEL

How Do I Log Out?

You will find the option to log out at the top of your HUB page.

Example Client, welcome to your Private and Secure Client Portal

From this page, you can access many tools needed for account management.

In "Your Pages," you will find the link to process an account transaction. In "Your Documents," you will find all relevant account information, including account statements. You can also send private messages to the advisor using the "Private Message" function. [LOGOUT](#)