



A Portal for Every Piece of Your Financial Life

The Gainplan online financial management portal provides the tools you need to manage the most important parts of your financial life—from any device.



Collaborate with Our Team

- Web chat or screen share with our team directly through your portal
- Securely store and share documents in the document vault



View Your Full Financial Picture

- Connect your financial accounts for automatic updates
- Track investment performance
- Monitor your balance sheet



Stay Up to Date and Informed

- View key reports on demand
- Email and text communications on dozens of events—like trades, distributions, and model changes
- Access video updates from our team



Put Your Plans Into Action

- Access eMoney through a single sign on
- View and update your risk tolerance assessment