

Financial Professional Gateway (FinPro Gateway)

Maintaining Email Addresses in FinPro Gateway Guide

Email addresses are essential for Financial Professional Gateway (FinPro GatewayTM) account access and communications. This guide provides step-by-step instructions for updating email addresses in FinPro Gateway profiles.

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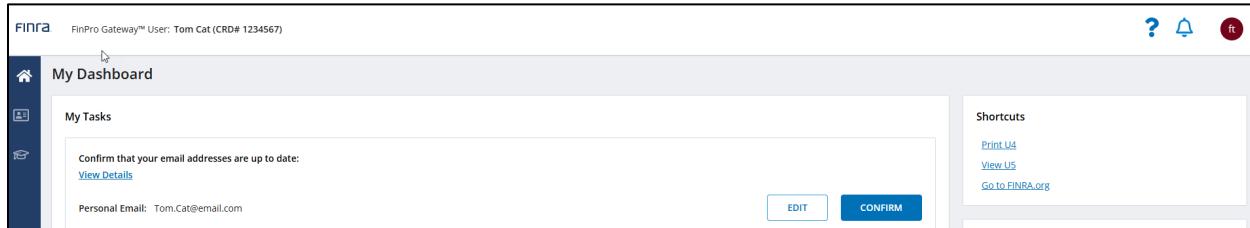
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Email Address Confirmation or Edit

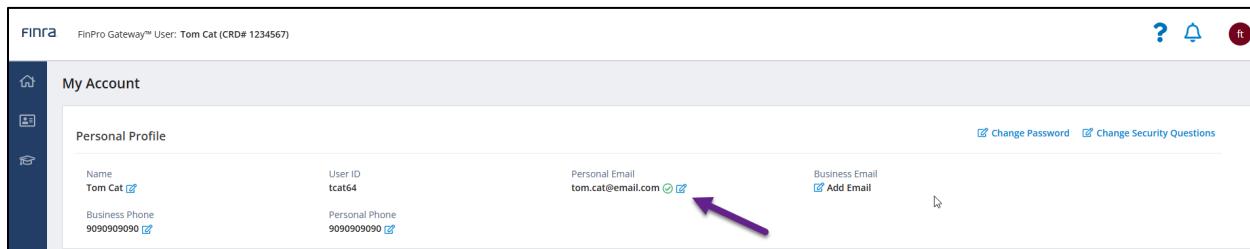
You will see a task to **Confirm that your email address(es) are up to date** displayed on your **My Tasks** list every three months to ensure the information is accurate.

Click **CONFIRM** if the information is accurate, if not click **EDIT** to update the information.

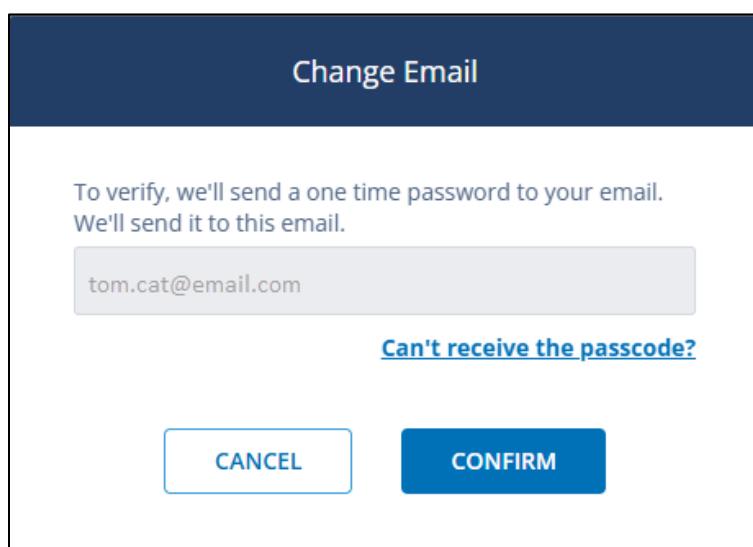


Edit Your Email Address

Select the edit icon next to the email address that needs to be updated to make the necessary change.

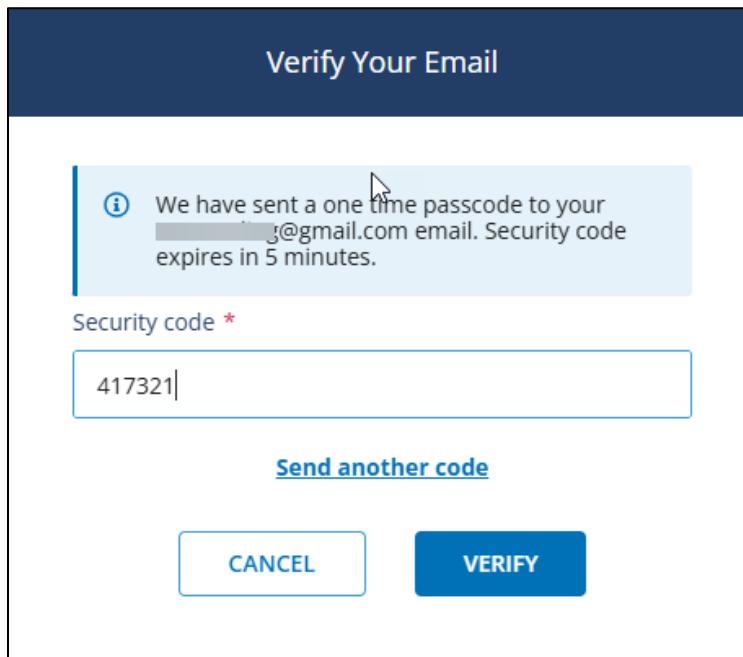


To initiate a change, you must select **CONFIRM** on the Change Email window to send a one time passcode to your original email address (which is prepopulated into the field).



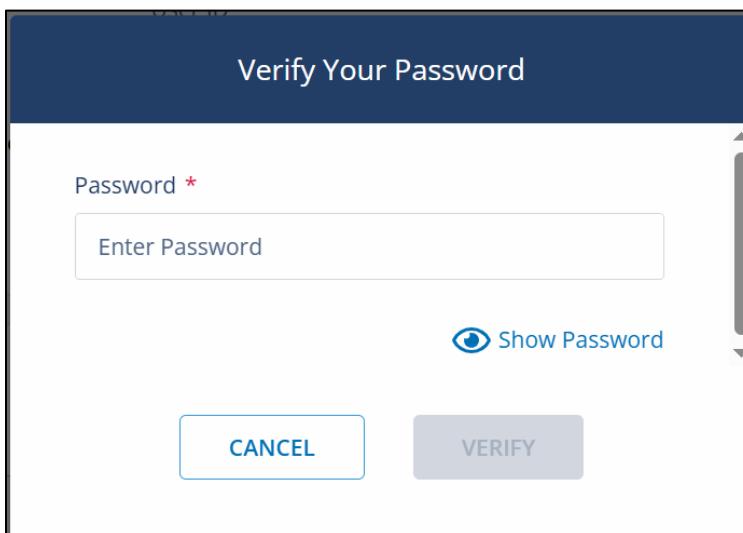


Once you receive a one time passcode to your original email address, enter it and click the **VERIFY** button to initiate the email address change.



The window is titled "Verify Your Email". It contains a message box with an info icon: "We have sent a one time passcode to your [redacted]@gmail.com email. Security code expires in 5 minutes." Below the message is a text input field labeled "Security code *". The input field contains the value "417321". To the right of the input field is a link "Send another code". At the bottom are two buttons: "CANCEL" and "VERIFY".

If you cannot access the original email account on your profile, you may select **Can't receive the passcode?** on the Change Email window, which will prompt you to input your FinPro Gateway password to initiate the email address change. Once your FinPro Gateway password has been entered, click the **VERIFY** button to initiate the email address change.



The window is titled "Verify Your Password". It has a text input field labeled "Password *". The input field is empty and contains the placeholder "Enter Password". To the right of the input field is a "Show Password" button with an eye icon. At the bottom are two buttons: "CANCEL" and "VERIFY".

After you verify, enter your new email address on the Change Email window then select **CONFIRM** to make the change.

Change Email

New Email *

Verify New Email *

CANCEL **CONFIRM**

Once your new email address has been confirmed, the system will prompt you to verify the new email address with a one time passcode sent to your new updated email address.

Enter the passcode you received to the new email address to complete the process.

If you do not receive a code to your new email address, confirm that the new email address that you provided is correct. If it is, check your spam or junk folder. If necessary, select **Send another code** and enter the code received to complete the process.

Your email is now successfully updated.