

# Register your eMoney / Client Portal account

1 Navigate to your email

2 Look for and open an email titled "Register for Your Financial Website..."

3 Open the email and click "REGISTER NOW ►"

A screenshot of an email registration page. The background is dark grey. The text is white. At the top, it says "on behalf of Michael Davis, CFP®, ChFC®, CLU®, CLTC®" followed by "u a one-time link to register for access to your financial". Below that, it says "l expire on 3/19/2025." and "e link expires before you can complete the registration" followed by "ntact your financial representative to request a new link." At the bottom right, there is a blue button with the text "REGISTER NOW ►" and a white arrow pointing right. At the bottom center, there is contact information for Michael Davis, including his name, credentials, phone number, and email address.

on behalf of Michael Davis, CFP®, ChFC®, CLU®, CLTC®  
u a one-time link to register for access to your financial

l expire on 3/19/2025.

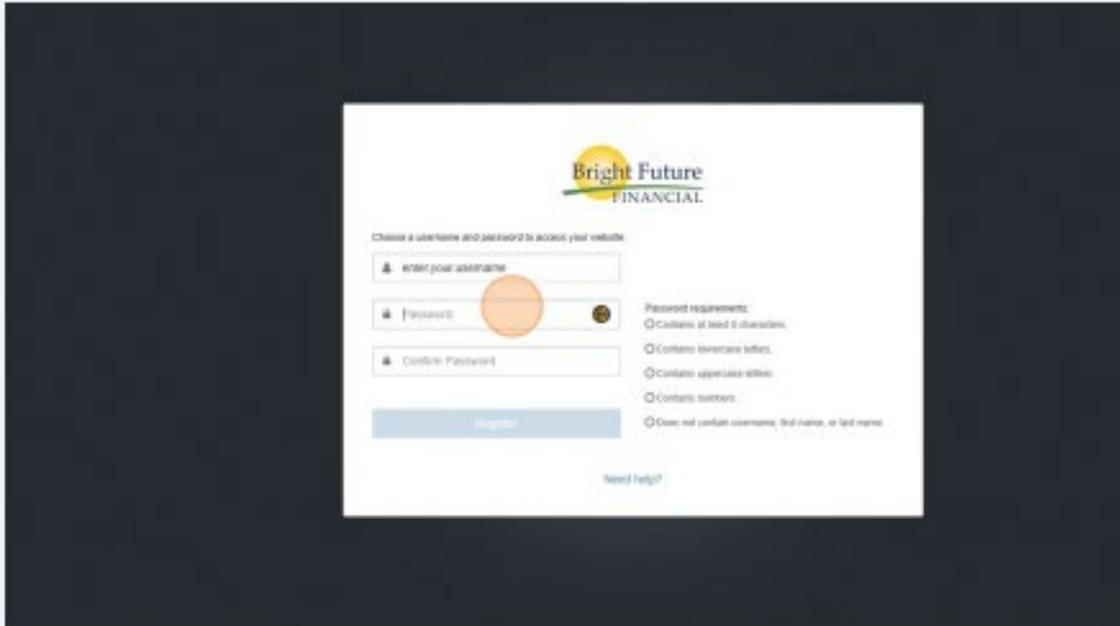
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REGISTER NOW ►

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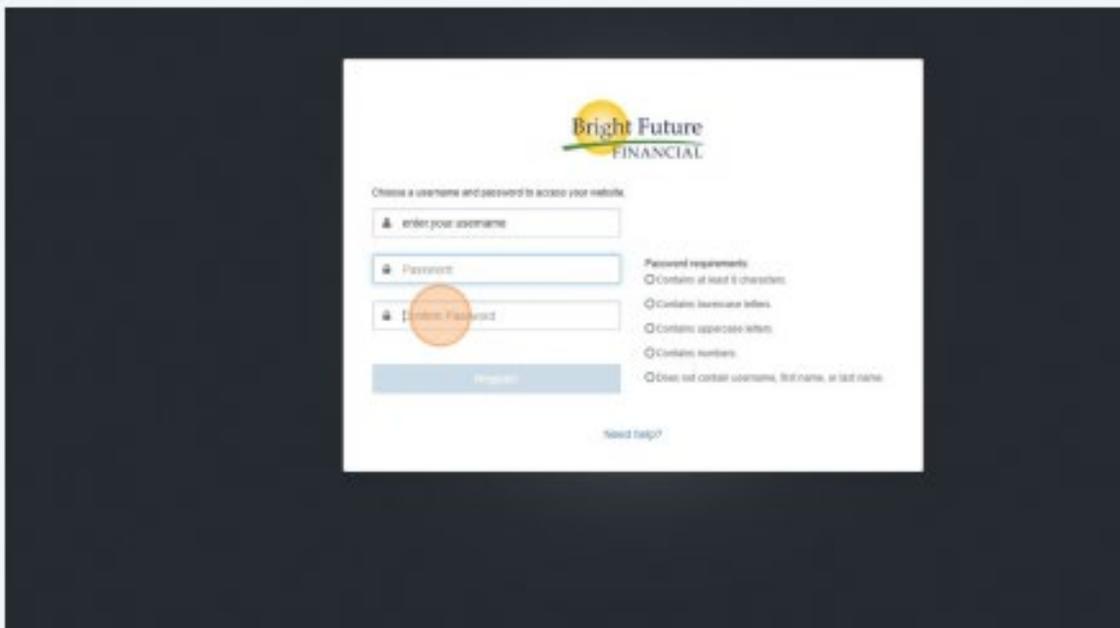
**Michael Davis, CFP®, ChFC®,  
CLU®, CLTC®**  
(978) 534-0130  
[mdavis@BrightFutureFinancialLLC.com](mailto:mdavis@BrightFutureFinancialLLC.com)

- 4 Make sure the top field has your email as the username. Click this password field and type in your desired password that meets the requirements listed on the right.



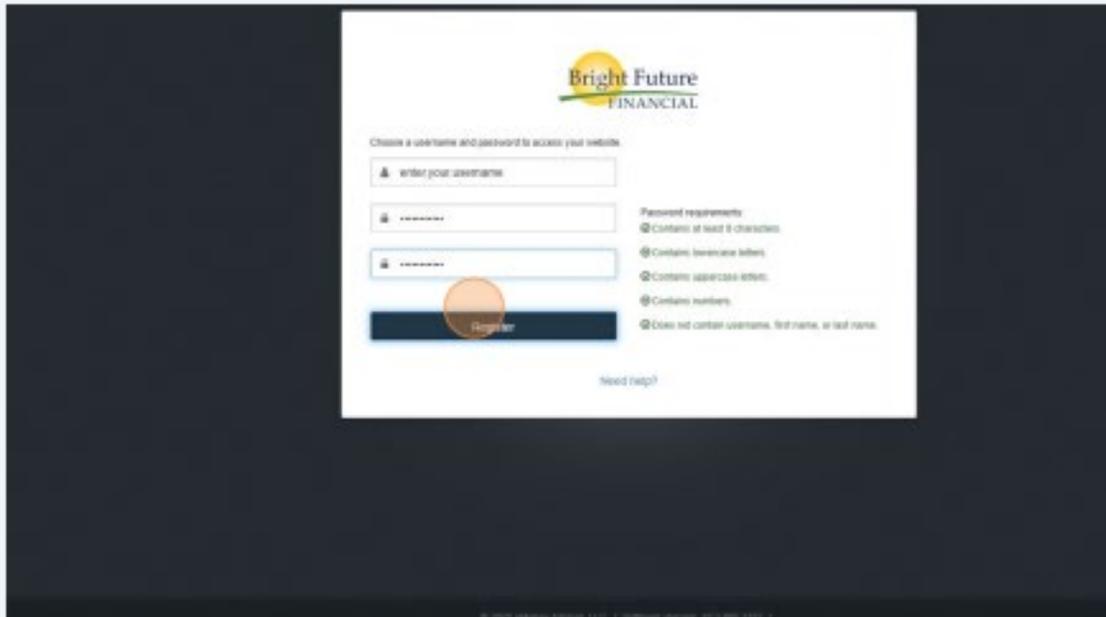
The screenshot shows the login page for Bright Future Financial. At the top center is the logo, which consists of a yellow sun icon above the text "Bright Future" and "FINANCIAL" below it. Below the logo, the text "Choose a username and password to access your website." is displayed. There are three input fields: "enter your username", "Password", and "Confirm Password". The "Password" field is highlighted with an orange circle. To the right of the input fields, there is a "Password requirements" section with five bullet points: "Contains at least 8 characters", "Contains lowercase letters", "Contains uppercase letters", "Contains numbers", and "Does not contain username, first name, or last name". Below the input fields is a blue "Sign In" button. At the bottom center, there is a link that says "Need help?".

- 5 Click this password field and confirm the password you would like to use.



This screenshot is identical to the one above, showing the login page for Bright Future Financial. The layout, including the logo, instructions, input fields, password requirements, and buttons, is the same. However, in this screenshot, the orange circle highlights the "Confirm Password" field instead of the "Password" field.

6 Click "Register"



The image shows a registration form for Bright Future Financial. At the top center is the logo, which consists of a yellow sun icon above the text "Bright Future" and "FINANCIAL" below it. Below the logo, the text "Choose a username and password to access your website." is displayed. There are three input fields: the first is for the username, labeled "enter your username"; the second and third are for passwords, both masked with dots. To the right of the password fields, there is a "Password requirements" section with four bullet points: "Contains at least 8 characters", "Contains lowercase letters", "Contains uppercase letters", and "Contains numbers". Below the input fields is a blue "Register" button with a white circular icon. At the bottom center, there is a link that says "Need help?".

7 2-Factor Authentication (2FA) helps secure your account. We suggest using it. To enable it, click "Enable". If you would not like to enable 2FA, click "skip".



The image shows a dialog box titled "2-Factor Authentication". The text inside the dialog box reads: "To further increase the security of your account, you can optionally enroll in 2-Factor Authentication. This will prompt you to enter a verification code sent to your phone when signing in. If needed, you can enable this at any time on the settings page." At the bottom of the dialog box, there are two buttons: a white "Skip" button and a blue "Enable" button with a white circular icon.

- 8 Type in your mobile phone number then click "Enroll".

**2-Factor Authentication**

Please enroll in 2 Factor Authentication by entering your phone number below.

You will be sent a verification code via text message. To request a phone call, enroll and proceed to the next page.

What phone number would you like to use to receive the verification code?

(375) 855-1110

Enroll

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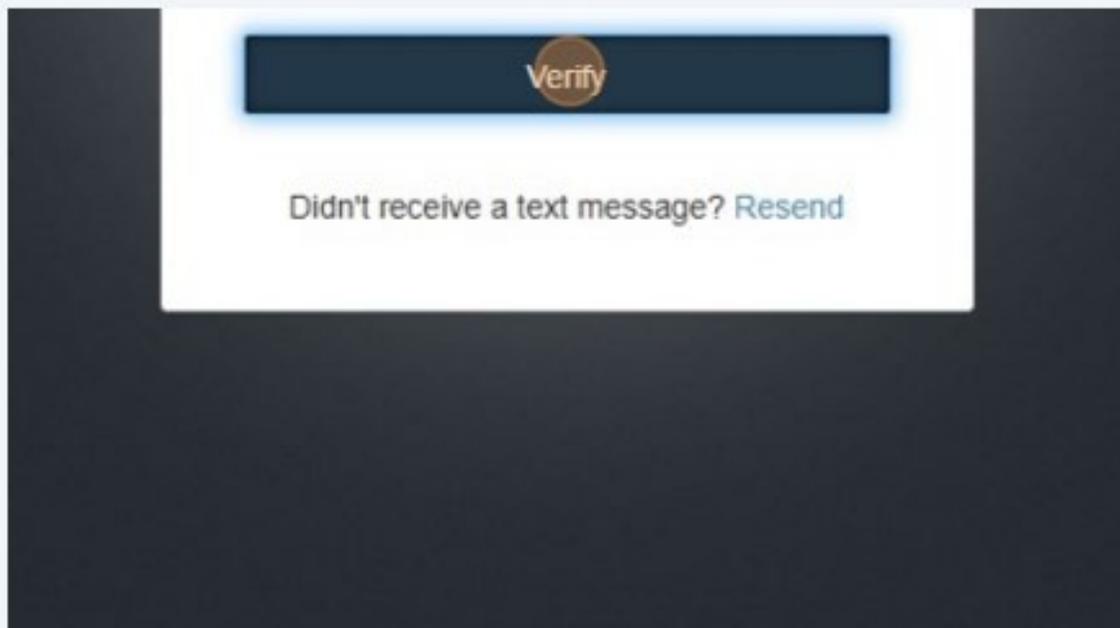
- 9 Click this text field and enter the verification number you were sent in your text messages.

6-Digit Verification Code

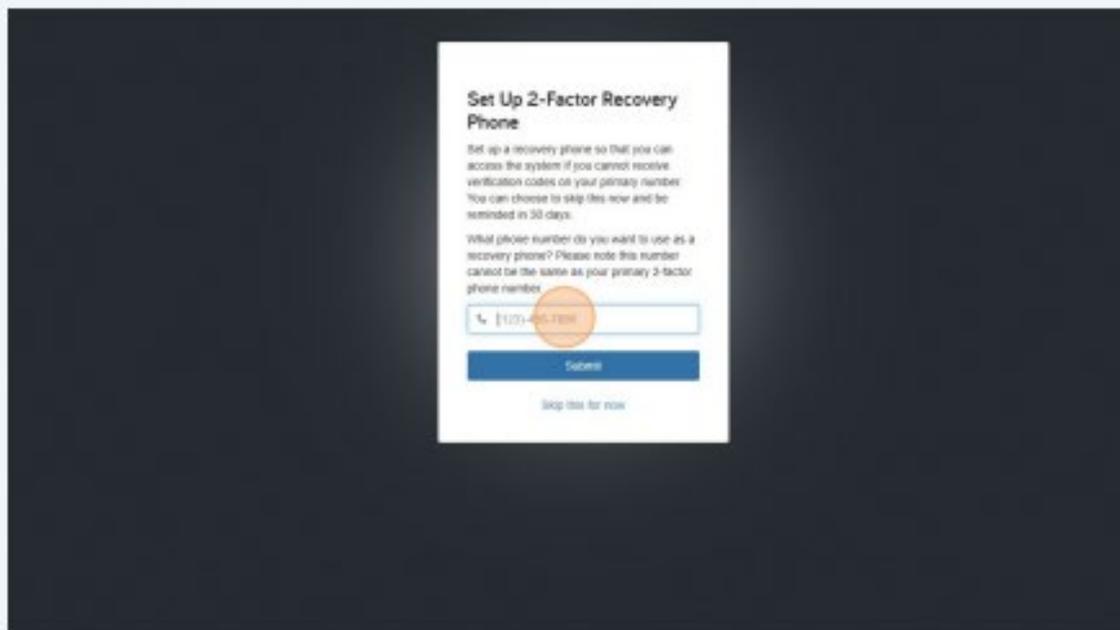
Verify

Didn't receive a text message? [Resend](#)

**10** Click "Verify"



**11** To ensure you are able to recover your account if 2FA has issues, we suggest adding a recovery phone. If you would like to do this, please select the input box and put in a secondary phone number, then click "Submit". If you would not like to do this, you may click "Skip this for now".



12 Click "Submit"

**Set Up 2-Factor Recovery Phone**

Set up a recovery phone so that you can access the system if you cannot receive verification codes on your primary number. You can choose to skip this now and be reminded in 30 days.

What phone number do you want to use as a recovery phone? Please note this number cannot be the same as your primary 2-factor phone number.

(917) 710-8342

**Submit**

[Skip this for now](#)

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13 Click this dropdown and select the security question you would like to answer.

**Security Questions**

You will be asked one of these questions when logging in from a device for the first time or to reset your password if you forget it.

**Question 1 of 3**

Set a question...

Answer

Confirm Answer

Set a question...

What is your favorite pet's name?  
When were you married (mm/dd/yyyy)?  
What is your favorite color?  
What was the middle of your first car?  
What is the name of your first school?  
What is your father's middle name?  
What is your first (maiden) middle name?  
What is your favorite teacher's name?  
What is the title of your favorite book?

**Question 3 of 3**

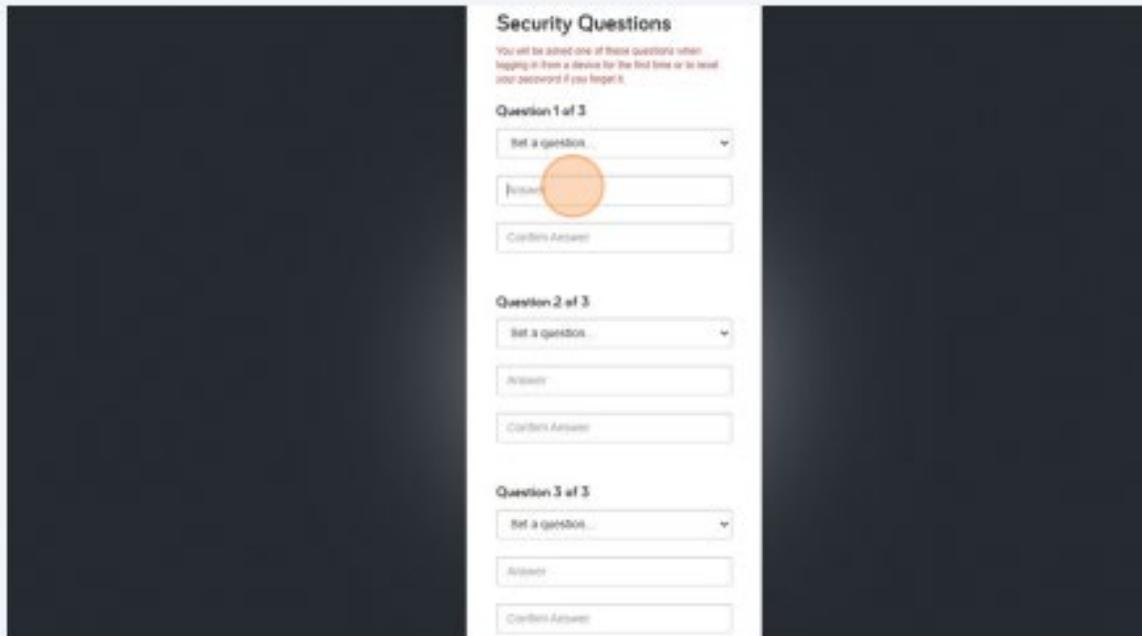
Set a question...

Answer

Confirm Answer

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- 14 Click this answer field and input the answer to your security question.



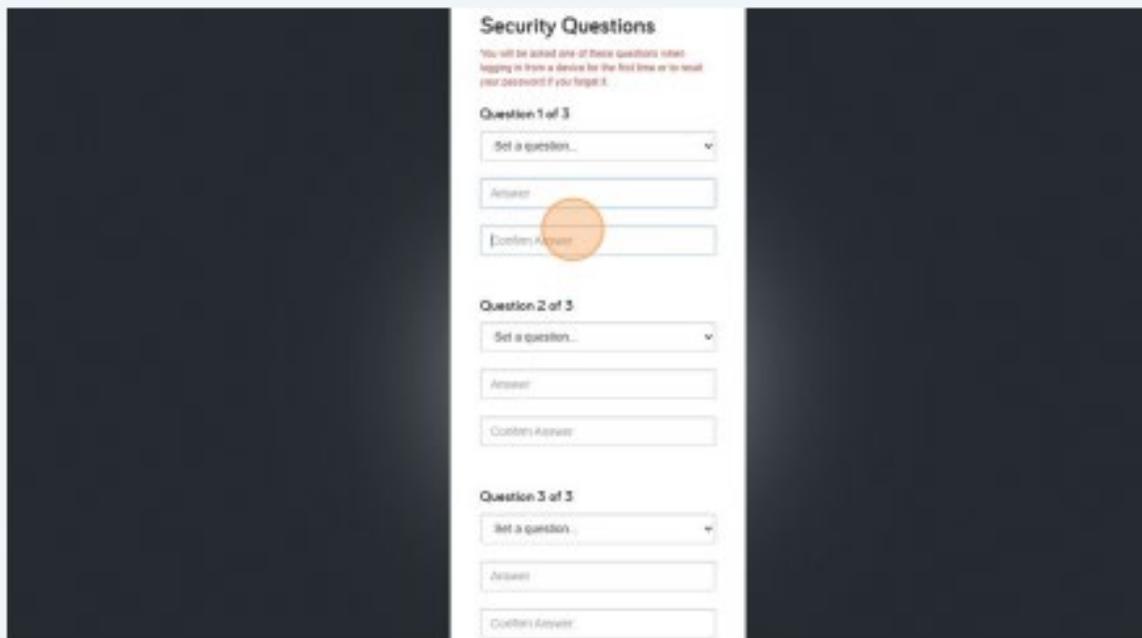
**Security Questions**  
You will be asked one of these questions when logging in from a device for the first time or to reset your password if you forget it.

**Question 1 of 3**  
Set a question...  
Answer  
Confirm Answer

**Question 2 of 3**  
Set a question...  
Answer  
Confirm Answer

**Question 3 of 3**  
Set a question...  
Answer  
Confirm Answer

- 15 Click this answer field and confirm the answer to your security question.



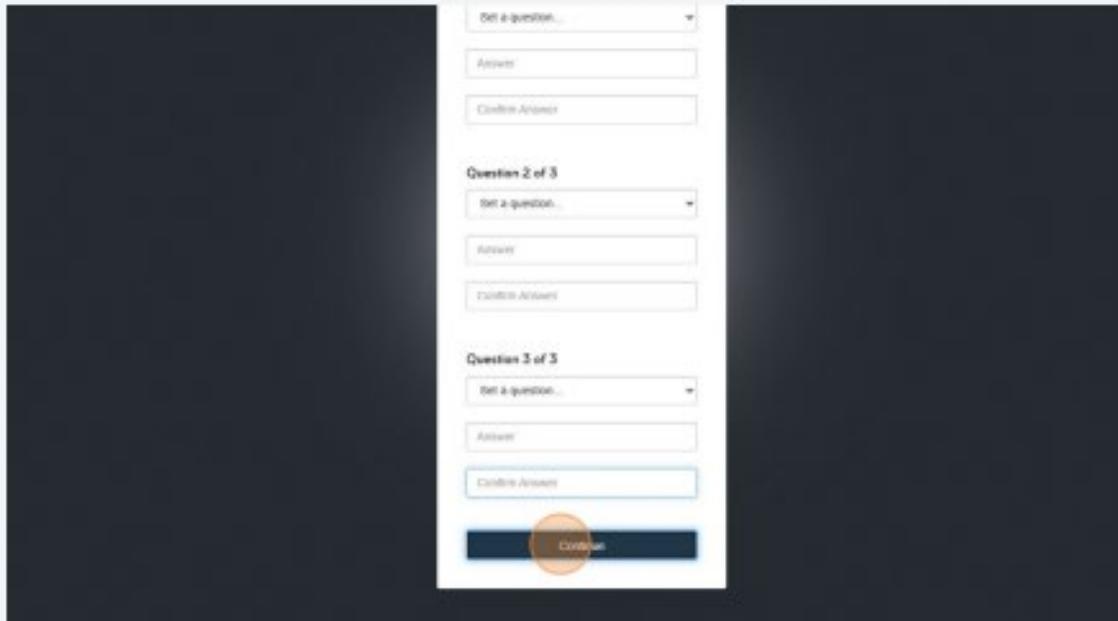
**Security Questions**  
You will be asked one of these questions when logging in from a device for the first time or to reset your password if you forget it.

**Question 1 of 3**  
Set a question...  
Answer  
Confirm Answer

**Question 2 of 3**  
Set a question...  
Answer  
Confirm Answer

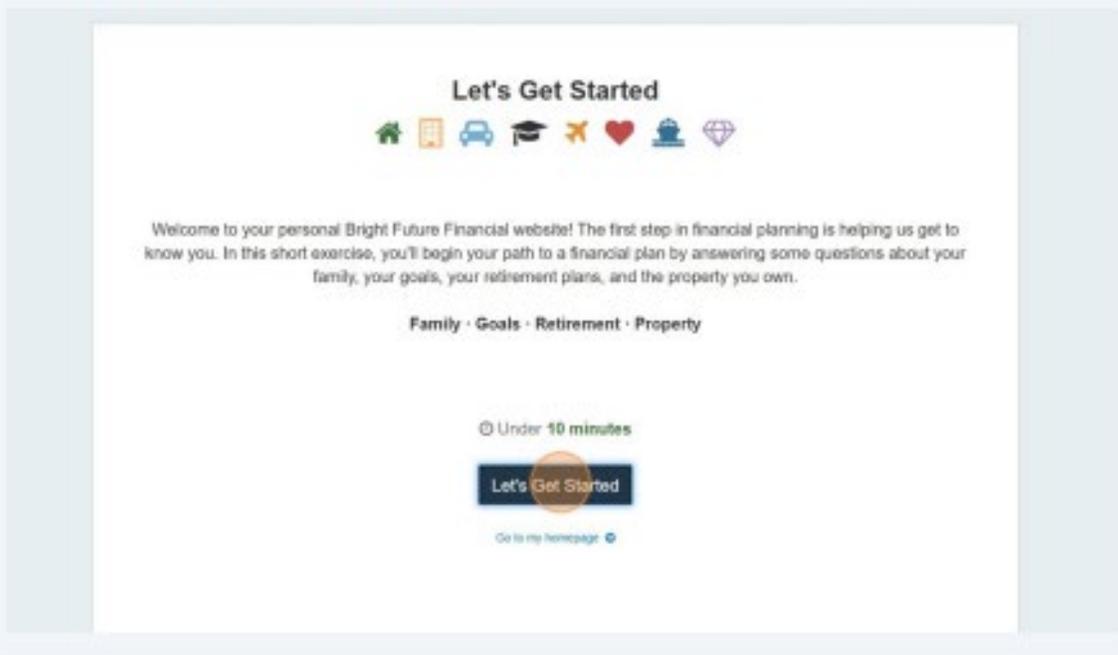
**Question 3 of 3**  
Set a question...  
Answer  
Confirm Answer

16 Continue this until all 3 security questions are complete them click "Continue".



The screenshot shows a central white form on a dark background. The form contains three identical question sections. Each section starts with a dropdown menu labeled "Set a question...", followed by an "Answer" input field and a "Confirm Answer" input field. The sections are labeled "Question 1 of 3", "Question 2 of 3", and "Question 3 of 3". At the bottom of the form is a dark blue button with the word "Continue" in white text, which is highlighted with a circular orange callout.

17 Now you will be in your account. We suggest taking the brief questionnaire at the beginning so the program is able to better support you. If you would like to take it, please select "Let's Get Started".



The screenshot shows a white page with a light blue border. At the top center is the heading "Let's Get Started" in bold black text. Below the heading is a row of eight colorful icons: a house, a document, a car, a graduation cap, a plane, a heart, a person, and a diamond. Below the icons is a paragraph of text: "Welcome to your personal Bright Future Financial website! The first step in financial planning is helping us get to know you. In this short exercise, you'll begin your path to a financial plan by answering some questions about your family, your goals, your retirement plans, and the property you own." Below the text is the text "Family · Goals · Retirement · Property" in bold. Further down is a clock icon followed by the text "Under 10 minutes". Below that is a dark blue button with the text "Let's Get Started" in white, highlighted with a circular orange callout. At the bottom is a link that says "Go to my homepage" with a small blue icon.

## 18 If you would not like to take it, click "Go to my homepage"

The screenshot shows the top navigation bar with the Bright Future Financial logo on the left and the user name 'CANDI MICHAEL DAVIS, CFP®, ChFC®, CLU®, ChTOS' and a 'Sign Out' link on the right. Below the navigation bar is a progress indicator with three steps: 'Personal Life' (active), 'Financial Life', and 'Goals'. The main content area is titled 'What's on your mind?' and includes a sub-header 'Our experienced team of professionals can help in all facets of planning for your financial future.' Below this is a section 'Select all that apply:' with a grid of radio button options: 'Planning for Retirement', 'Providing a Legacy', 'Caring for Parents', 'Contributing to Charity', 'Planning for a Business', 'Saving for College', 'Saving for Major Purchases', 'Managing a Budget', 'Maximizing Investments', and 'Minimizing Taxes'. At the bottom of the grid is a link 'Click here to add your own'. A 'Go to my homepage' button is located in the top right corner of the form area.

## 19 Click "Continue"

This screenshot is identical to the one above but features a modal dialog box overlaid on the form. The dialog box has a title 'ARE YOU SURE YOU WANT TO GO DIRECTLY TO YOUR WEBSITE?' and contains the following text: 'Taking a few minutes to fill out basic information about yourself will help you get a head start on getting your website up and running.' and 'Please be aware, each time you log in you will be prompted to go through these questions until they have been completed.' At the bottom of the dialog box are two buttons: 'Continue' (highlighted with an orange circle) and 'Cancel'.

