Technologies to support our clients

Purpose – provides online access to your Schwab investment accounts
Access – Client Center on ToYourWealth.com
Features
- Review statements
- Review tax documents
- View account balances and trade activity

Purpose – client portal to FSG's portfolio management software
Access – Client Center on ToYourWealth.com
Features
- Aggregates financial accounts
- Review asset allocation, personal performance, and account breakdown

Purpose – provides online, secure file storage and sharing
Access – Client Center on ToYourWealth.com
Features
- Electronic warehouse for meeting documents, quarterly reports, estate documents, tax documents, and other personal information

Purpose – virtual conferencing technology for individual or group meetings
Access – Customized invitations sent via email
Features
- Camera/microphone sharing
- Computer screen sharing
- Remote access (allows us to "drive" your computer)

Access the FSG Client Center at https://toyourwealth.com/client-center
For assistance with any of these tools, please call us at 262-554-4500