



User Guide

LOGGING IN

Go to www.sivialaw.com and click on “Client Portal – Log In Now” (pictured below) or you can go directly to our site by entering http://www.sivialaw.com/client_portal.asp into your web browser.



To begin the Log In process, enter the member number provided to you by SBLs. Next, enter the answer to your security question. Finally, enter your password. This will take you to the *SBLs Client Portal* Home Page.

Please Login

Client Login

Client #:

Forgotten Password? [Click Here](#)

Advisor Connect

Username:

Password:

Family Connect

Username:

Password:

The SBLS Client Portal Home will provide you with a dashboard overview of the documents and outline accounts you have stored in your *SBLS Client Portal* account.

John Doe and Jane Doe
ClientDocx Account

10 Documents Stored	7 Online Accounts
<ul style="list-style-type: none">• 3 Stock• 2 Power of Attorney• 1 Articles of Incorporation• 1 Articles of Organization• 1 Buy-Sell Agreement• 1 Deed• 1 Trust	

PERSONAL INFORMATION

Personal Info is where your individual information is stored. TO edit any of your personal information, make any changes necessary and click “Save Changes” at the bottom of the screen.

Personal Info

Primary User

First Name:	<input type="text" value="John"/>
Middle Initial:	<input type="text"/>
Last Name:	<input type="text" value="Doe"/>
Address:	<input type="text" value="217 S. Main Street"/>
Address (line 2):	<input type="text"/>
City:	<input type="text" value="Edwardsville"/>
State:	<input type="text" value="Illinois"/> ▼
Zip Code:	<input type="text" value="62025"/>
Home Phone:	<input type="text" value="618-659-4499"/>
Work Phone:	<input type="text" value="618-659-4488"/>
Cell Phone:	<input type="text"/>
Date of Birth:	<input type="text" value="06/01/1976"/> (mm/dd/yyyy)

You may also add a Secondary User, such as a spouse, after the Primary user that will use the same Login information, but will have separate Account Info, and also the ability to upload and download their personal documents.

Secondary User

First Name:	<input type="text" value="Jane"/>
Middle Initial:	<input type="text"/>
Last Name:	<input type="text" value="Doe"/>
Address:	<input type="text" value="217 S. Main Street"/>
Address (line 2):	<input type="text"/>
City:	<input type="text" value="Edwardsville"/>
State:	<input type="text" value="Illinois"/> ▼
Zip Code:	<input type="text" value="62025"/>
Home Phone:	<input type="text" value="618-659-4499"/>
Work Phone:	<input type="text" value="618-659-4488"/>
Cell Phone:	<input type="text"/>
Date of Birth:	<input type="text"/> (mm/dd/yyyy)

Your Login Info is how you will be able to log in and access your *SBLs Client Portal* account. The email you enter in this area will be used in the event you need to reset your password. You can always change your password as well as a security question and answer.

Login Info

Email:	<input type="text" value="acs@sivalaw.com"/>
New Password:	<input type="text"/>
Confirm New Password:	<input type="text"/>
Security Question:	<input type="text" value="Where was your first job?"/> ▼
Security Answer:	<input type="text" value="sbls"/>

Your Privacy settings are where you can allow Account Info to be seen or hidden from SBLs. This is a personal choice; however, any information provided via the *SBLs Client Portal* will never be seen by another party, including pre-approved Family and Advisors who are provided a Login.

Privacy

Hide Online Account
Information from Law Firm:

ONLINE ACCOUNTS

Online Accounts is an area where you are able to store your usernames and passwords for your various online accounts such as: Social Media accounts (Facebook, Twitter, LinkedIn, etc.), Bank accounts, Online Shopping accounts, etc.

John Doe

Name	URL	Username	Password	Manage
Facebook	http://www.facebook.com	JohnDoe@sivialaw.com	cardinals1	Delete
Ebay	http://www.ebay.com	JohnDoe618	cardinals4	Delete
Gmail	http://www.gmail.com	JohnDoe618@gmail.com	cardinals5	Delete

You can assign an online account to a primary, secondary, or joint user.

Jane Doe

Name	URL	Username	Password	Manage
Facebook	http://www.facebook.com	JaneDoe@sivialaw.com	cardinals2	Delete
Yahoo	http://www.yahoo.com	JaneDoe618@yahoo.com	cardinals6	Delete

Joint Accounts

Name	URL	Username	Password	Manage
Bank of Edwardsville	http://www.4thebank.com	JandJDoe	cardinals3	Delete
Northwestern Mutual	http://www.northwesternmutual.com	DoeFinancial	cardinals7	Delete

Any accounts that are store will be stored by the account holder. To add a new online account, click “Add an Account” and enter in the information for the new online account and click “Add”.

Add an Account

Account Holder: ▼

Name:

URL:

Username:

Password:

DOCUMENTS

Documents are where all of the documents are stored in your *SBL Client Portal* account. To view any documents, click on the links to open them as PDF's. The Description field next to each document is editable. To do so, make any changes to the field and click "Update Descriptions".

Financial Documents	Date Added	Description	Owner	Delete	Share
Stock	01/09/2012	<input type="text" value="Google"/>	John Doe	Delete	<input type="checkbox"/>
Shared with advisors: Matt Watkins (x)					
Stock	01/09/2012	<input type="text" value="Walmart"/>	Jane Doe	Delete	<input type="checkbox"/>
Shared with advisors: Matt Watkins (x)					

On your list of documents, you may see some that have a "Delete" link next to them and some that do not. The ones that do not have this link have been locked by SBLs. A locked document cannot be deleted by the client.

Legal Documents	Date Added	Description	Owner	Delete	Share
Power of Attorney	01/09/2012	<input type="text"/>	John Doe		<input type="checkbox"/>
Shared with family: Allison Sutton (x) , Jennifer Haynes (x)					
Power of Attorney	01/09/2012	<input type="text"/>	Jane Doe		<input type="checkbox"/>
Shared with family: Allison Sutton (x) , Jennifer Haynes (x)					
Deed	01/09/2012	<input type="text"/>	Joint	Delete	<input type="checkbox"/>

To share a document with an Advisor or Family member that has been linked to you by SBLs, click the "Share" checkbox next to the appropriate document. Then, from the dropdown menu, select the name of the Advisor or Family member with whom you would like to share and click "Share". To cancel sharing, click the "X" icon beneath the document next to the name of the Advisor or Family member with whom you want to end sharing.

Select a Family Member ▼

Share

Select an Advisor ▼

Share

Any documents that have been left unlocked by SBLs you are able to upload. To do so, scroll to the bottom of your screen. Browse your computer for the appropriate file, assign the document name from the dropdown menu (you can choose the primary user, secondary user, or joint), enter a description (this is optional) and select an owner of the document. Click the “Upload File” to add this document to your *SBLs Client Portal* account.

Upload File

File: No file chosen

Document Name:

Description:
(Optional)

Owner:

QUESTIONS

For questions, or additional information regarding the use of the *SBLS Client Portal*, there is contact information on the top of your Home screen or at www.sivialaw.com.

Sivia Business & Legal Services
217 South Main Street
Edwardsville, IL 62025
Phone: 618-659-4499
Email: acs@sivialaw.com
Web: www.sivialaw.com

You may also call our office to schedule a Free 30-minute tutorial appointment in our office. Our Marketing Communications Manager will sit down and give you a complete demonstration of the *SBLS Client Portal* and answer any questions at this time. This is a great opportunity to get acquainted with your own personal Login, as well as add Advisor and Family members to your account.