

To Access Everimagine Financial Planning’s Online Forms

Please review the information below:

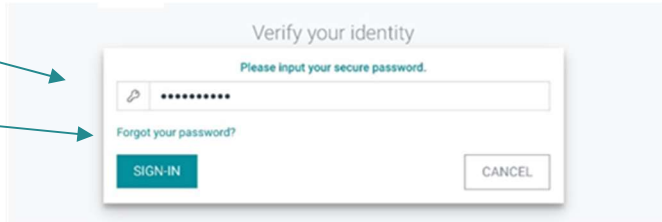
1. Our online forms are sent by email. The subject line looks like this: **An invitation from Elisa Ordona:**
2. In the body of the email is a message instructing you to “click on the button below.” This button shows the name of the form to be completed in a colorful rectangular background. It may look like this:

When you are ready to proceed, please click on the button below



3. To access the form, you may need to enter your password. If you haven’t set your password yet, a PIN number will automatically be sent to your mobile phone when you click on the button. Once you enter the required PIN number, you’ll be able to set a password.

4. Once your password is set up, you’ll be asked to enter it and sign in. It looks like this: Note: if you don’t remember your password, click on the “Forget your password?” A PIN number will be then sent to your mobile phone to set up another password.



5. Please retain this password for future use because you’ll need to enter that password each time you need to e-sign a form or access high security documents.

In general, EFP online forms may be repeatedly accessed by clicking on the form’s button in the form’s notification emails. These notification emails include the original email as well as ongoing notification reminder emails. You may also access the online form through your web browser if you save the form’s URL address. The form will be available to access until the form is completed/finished by you or closed by the EFP advisor.