

Register for online access at [www.cirstatements.com](http://www.cirstatements.com)



User ID

  
 

Welcome to CIRStatements.com - your source for consolidated account information! CIRStatements.com allows you to easily consolidate and organize all your investment accounts and generate in-depth reports. Access your accounts anytime from anywhere in the world on our secure website!

**To begin, click on Register Now**

### Learn About Wealth Reporting

Albridge offers recorded and live training sessions, with topics designed to give you a brief overview of specific functionality in the Wealth Reporting system.

For information about on-demand recorded sessions or to register for a live demo, see the [Albridge website](#).

In addition, within-product assistance will give you information about the concepts and features of the system, including quick introductions to all the new usage features in this release of the product.

### Questions or Comments?

#### Advisors

If you have any questions or comments regarding the product, please call or email customer support.

#### Investors

Please contact your financial advisor for assistance.

### Web Browser and Device Compatibility

Release 24.1.0.0

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Please enter your Social Security Number and Client Temp Password:  
**All fields are required.**

Social Security Number:  
(ie. 111223333)

Client Temp Password:  
(must be 6-10 characters)

Please type the word seen in the image:

Enter your SSN,

The temporary password "LWMBEF"

And type the word you see in the box below

*Note: The phrase/image you see will be different than what is pictured here.*

*If you cannot read the image, click 'New Image'*

**Registration Process: Step 1 of 2:**

**Please accept the User Agreement:**

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Previous

Decline

Accept

Read the User Agreement and click Accept

Registration Process: Step 2 of 2:

**\* These fields are required** Please select a User Name and Password.  
User Name and Password can be alphanumeric and must be between 6 and 20 (User Name)  
or 6 and 20 (Password) characters

User Name: \*

Password: \*

Confirm Password: \*

Create your own User Name and Password.  
This is the information you will use to log in  
going forward.

Please enter the following information.

Prefix:

Last Name: \*

First Name: \*

Middle Initial:

Suffix / Designation :

Day Phone: \*

Evening Phone:

Fax:

E-Mail: \*

Address: \*

Address2:

City: \*

State: \*

Zip Code: \*

Date of Birth: \*  /  /

Enter your personal information.

[Previous](#) [Cancel](#) [Next](#)

Click on Next

Registration Confirmation:

Your registration request has been sent to your financial advisor for approval. A confirmation will be sent to you via e-mail. You will be able to login and use our services after receiving the confirmation. If you have any questions, please contact your financial advisor. Thank You.

Ok

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**Investors**

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Click 'OK.' You will then be taken back to the log in screen.

We will receive an email notifying us that you are requesting approval for access.

Once we approve your access you will receive a confirmation email and be able to log in and view your accounts.

Please return to [www.cirstatements.com](http://www.cirstatements.com) to log in.

If you have any problems or questions, please call our office and speak with

Sondra at (970) 241-5143 or email her at [sondra@legacywealthgj.com](mailto:sondra@legacywealthgj.com)

To view your Household Portfolio (i.e. all accounts under multiple SSNs, such as spousal and children accounts).

**CAMBRIDGE**  
INVESTMENT RESEARCH, INC.

John Doe, Legacy Wealth Management, LLC

REPORTS ACCOUNTS

### Run Report

Profile | Accts | Run Report

Client: John Doe

Portfolio: Combined Account Portfolio

Report / Package: Doe Family

Date: 05 / 18 / 2017

Protect Your Data: Before saving a report to any device, please ensure that you have password protected the device.

**Go** Printer Friendly Export

John Doe  
123 Main Street  
Anywhere, USA 45678

Michael Berry  
Legacy Wealth Management, LLC  
372 Ridges Boulevard  
Grand Junction, CO 81507  
970-241-5143

Combined Account Portfolio  
Date: 05/18/2017  
Created: 05/19/2017

If you do not see this option, or have any questions, please call our office and speak with Sondra (970) 241-5143 or email her at [sondra@legacywealthgi.com](mailto:sondra@legacywealthgi.com)