



CFA CLIENT PORTAL

To help protect your personal information and maintain the highest level of security, California Financial Advisors (CFA) uses Tamarac Envestnet to securely upload your Quarterly Reports. CFA’s client portal is complimentary, secure, and easy to use. You can access the CFA Client Portal anytime by navigating to calfinad.portal.tamaracinc.com and logging in with your email and password. Alternatively, you can access the portal directly our website at calfinad.com/resources.

CREATING YOUR ACCOUNT:

1. To activate your account, you will receive an automated email from noreply@envestnet.com. **For your security, the link will expire in 72 hours.**
2. You will then be prompted to create a unique password. For your security, this password must meet the following requirements:
 - a. Passwords must not contain your email address or parts of your full name that exceed two consecutive characters.
 - b. Passwords must be at least 12 characters and must contain characters from three of the following four character categories:
 - i. Uppercase letters (A - Z)
 - ii. Lowercase letters (a - z)
 - iii. Numbers (0 - 9)
 - iv. Non-alphanumeric (For example: !, \$, #, or % etc.)
3. After your first login, you will be prompted to read and accept the “Dynamic Reporting Portal” Terms of Use.
4. **Please note that your username is your email.**

FORGOT YOUR PASSWORD:

The screenshot shows the CFA login interface. It includes the CFA logo, input fields for 'Email Address' and 'Password', a 'Remember me on this computer' checkbox, and a blue 'SIGN IN' button. Below the sign-in button, the text 'Did you forget your password?' is followed by a blue link 'Recover it here' which is highlighted with a red box. A red arrow points to the right from the box.

If you cannot remember your password or you have received a message that your password is incorrect, please click the “Recover it here” link on the login screen and enter your email to request a password reset. You will receive an email with further instructions on how to reset your password.