Authorize Advisor Accounts

Advisor accounts allow an approved advisor from a different organization to view your full portfolio and send you messages. You decide which advisor(s) can see your portfolio.

First, go to akcis.org and log in with your username and password.









- Hover your mouse over your name in the red menu bar, found in the top right corner of your screen. Click Share My Portfolio in the dropdown menu that appears.
- The Share My Portfolio screen appears. Click Go to Advisor Accounts. If this option does not appear, there are no approved advisors for your site.
- The Advisor screen will appear, displaying all available advisors for your site. Locate the advisor(s) you want to allow access to your portfolio and click Add in their row.
- The screen will refresh. The advisor you selected will now show under the Your Advisors section. This person now has the ability to view your portfolio and message you directly.
 - To send your advisor a message, click Messages.
 - To remove your advisor and revoke their ability to view your portfolio, click Remove.