

How to: Sign into your SSO account

Sign into your SSO account

Once your account is set up and verified, you can return to logging in directly from the advisor portal.


Step 1: Initiate login

- Navigate to your advisor portal and click on **Advisor login** button
- Enter username (your personal email address)
- Click on the box next to **Keep me signed in** if you want your authentication to remain valid for the next 30 days
- Click the **Next** button



Sign In

Username

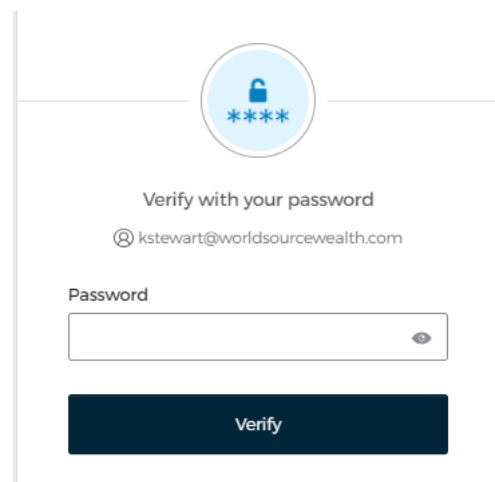
 This field cannot be left blank


☐ Keep me signed in

Next

Step 2: Enter password

- Enter your chosen password
- Click **Verify**





Verify with your password

@ kstewart@worldsourcewealth.com

Password

Verify



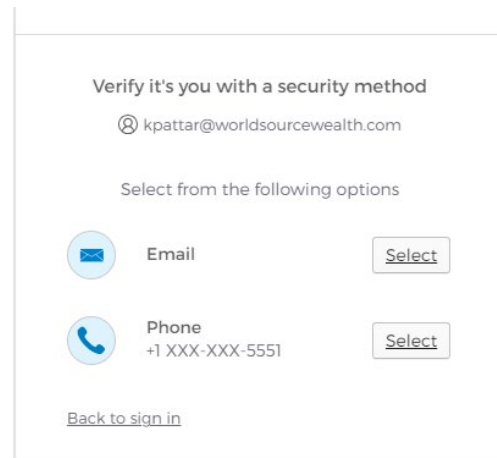
How to: Sign into your SSO account

Step 3: Multi-factor authentication (MFA) verification

Option 1: SMS or email

If you linked a mobile device to your SSO account during your account activation, you have the option to complete your MFA verification either via your mobile or your email.



- If you want to complete your MFA by receiving an email, click **Select** next to the email option
- If you want to complete your MFA by receiving an SMS to your mobile device, click **Select** next to the Phone option



Verify it's you with a security method

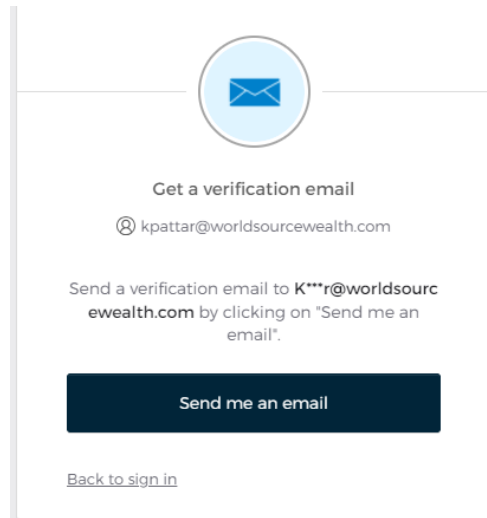
Ⓜ kpattar@worldsourcewealth.com


Select from the following options

	Email	Select
	Phone +1 XXX-XXX-5551	Select

[Back to sign in](#)

- If you select the email option, click on the **Send me an email** button to request a verification email from Okta
- When the email arrives, click the **Verify** button to authenticate your login
- Once you have successfully been authenticated, you will immediately be logged into your advisor portal





Get a verification email

Ⓜ kpattar@worldsourcewealth.com

Send a verification email to K***r@worldsourcewealth.com by clicking on "Send me an email".

[Send me an email](#)


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How to:

Sign into your SSO account

- If you select the Phone option, click on the **Receive a code via SMS** button
- When you receive the text message with the one-time passcode, enter the 6-digit code in the box provided
- Once you have successfully been authenticated, you will immediately be logged into your advisor portal



Verify with your phone

@ kstewart@worldsourcewealth.com

Send a code via SMS to +1 XXX-XXX-9646

Carrier messaging charges may apply

Receive a code via SMS

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Step 3: Multi-factor authentication (MFA) verification

Option 2: Email only

If you did not link a mobile device to your SSO account during your account activation, you will not be given the option to verify via SMS or email as you are in option 1. Instead, you will go directly to the email initiation screen.



How to:

Sign into your SSO account

- Click on the **Send me an email** button to request a verification email from Okta
- When the email arrives, click the **Verify** button to authenticate your login
- Once you have successfully been authenticated, you will immediately be logged into your advisor portal

