



CAIRN FINANCIAL APP INSTRUCTIONS



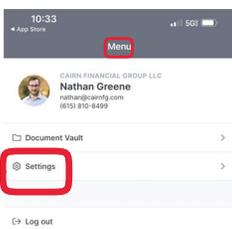
Downloading the app:

Click either of the above icons to be taken directly to the Cairn Financial app in the App Store (Apple users) or Google Play Store (Android users).

If you are currently viewing this letter on your computer or another device, you can search for “Cairn Financial” in either mobile store. It will appear as the familiar blue cairn icon (in the header above).

Logging in:

Your Cairn Financial login uses the same credentials as the online Client Portal. Once you are in the app, you can choose to use FaceID for future logins (see **Settings** below).



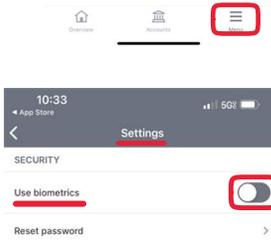
Navigating the app:

Performance: To view your performance, navigate to the “accounts” tab in the bottom center. Tap a single account title to see its individual performance or tap “managed accounts” to see a broader view of all your accounts managed by Cairn Financial Group.

[Video on viewing performance](#)

Financial Planning Clients are able to aggregate their personal accounts (mortgage, car loan, checking, savings, etc) via the *online client portal*. Accounts cannot be added in the app, but once added online, they can be viewed in the "overview" and "accounts" tabs in the app.

Menu tab: Tapping on the menu tab, you will see your “Document Vault”, where performance reports, account statements, and any other important documents you upload will be stored. You will also see Nathan’s contact information and app settings.



Settings: When you tap on settings, you can select to “use biometrics” (FaceID) to login to the app for easier access. If you would like to reset your password at any time, you can also do that in the settings section.

[Video on Menu \(document vault, settings, setting up FaceID\)](#)

Please email molly@cairnfg.com:

- If you have not yet logged into your client portal and/or need a new password.
- If you need help finding or downloading the app
- If you have any other questions or concerns