

Your guide to helping users navigate FinPro

We've launched a new website experience on finpro.protective.com to help financial professionals manage their business with more efficiency and control. Use this job aid to assist:

- New users [registering for an account](#) on FinPro
- Current users [moving an existing account](#) to FinPro
- Primary users [delegating account access](#) to other users

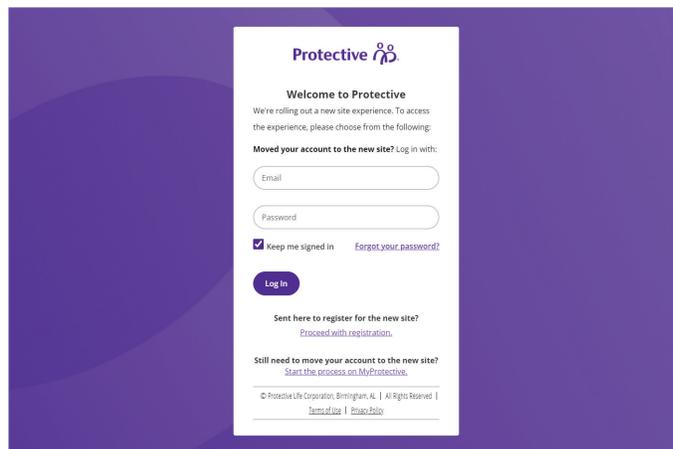
Registering a new user account on FinPro

Financial professionals new to Protective will need to register a new account on FinPro. Use the step-by-step guide below to help them through the registration process.

Step 1:

Navigate to the FinPro login page (finpro.protective.com/doing-business/dashboard).

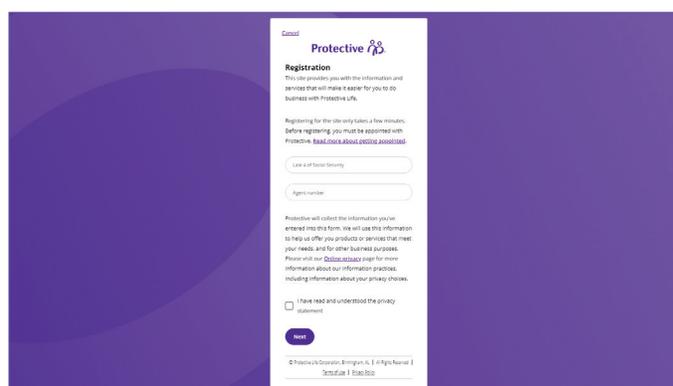
Click **Proceed with registration**



Step 2:

Enter last 4 digits of SSN and agent number.

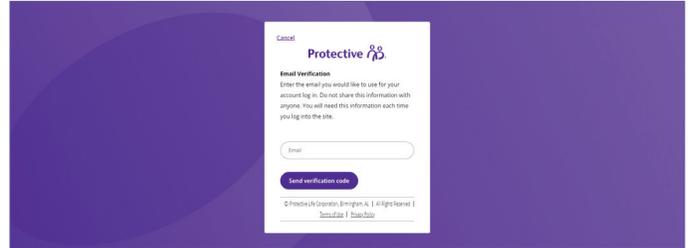
Click **Next**



Step 3:

Enter email address.

Click **Send verification code**



Cancel

Protective 

Email Verification

Enter the email you would like to use for your account log in. Do not share this information with anyone. You will need this information each time you log into the site.

Email

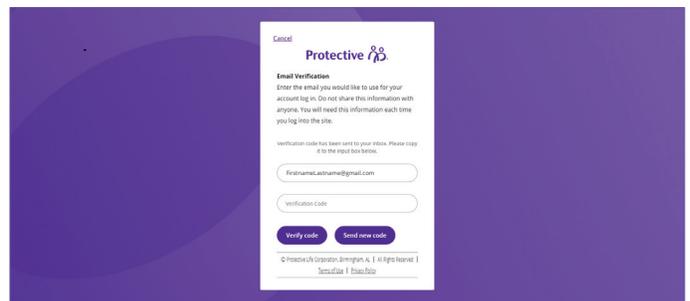
Send verification code

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Step 4:

Enter verification code sent via email.

Click **Verify code**



Cancel

Protective 

Email Verification

Enter the email you would like to use for your account log in. Do not share this information with anyone. You will need this information each time you log into the site.

Verification code has been sent to your inbox. Please copy it to the input box below.

Firstname.lastname@gmail.com

Verification Code

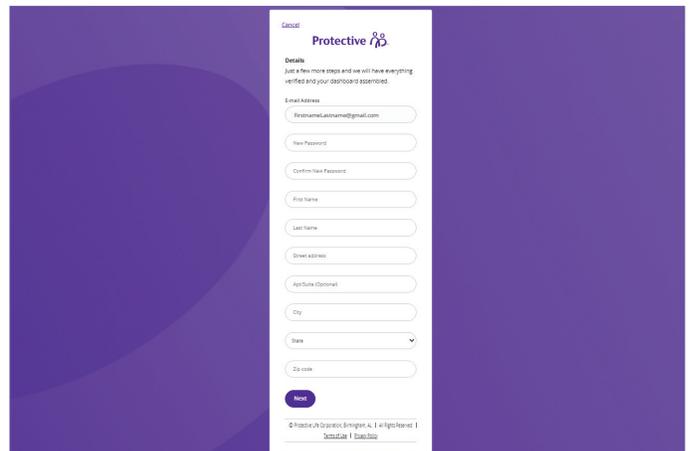
Verify code **Send new code**

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Step 5:

Enter account details, including new password and address.

Click **Next**



Cancel

Protective 

Details

Just a few more steps and we will have everything verified and your desktop is associated.

Email Address

New Password

Confirm New Password

First Name

Last Name

Street Address

Apartment (Optional)

City

State

Zip Code

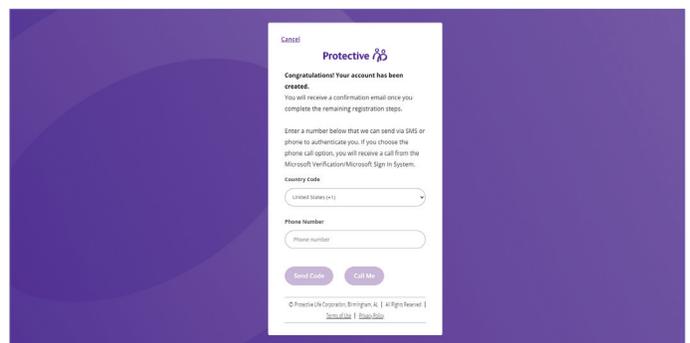
Next

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Step 6:

Enter phone number for multi-factor authentication.

- Click **Send code** to receive a text
- Click **Call me** to receive a phone call



Cancel

Protective 

Congratulations! Your account has been created.

You will receive a confirmation email once you complete the remaining registration steps.

Enter a number below that we can send via SMS or phone to authenticate you. If you choose the phone call option, you will receive a call from the Microsoft Verification/Microsoft Sign-In System.

Country Code

Phone Number

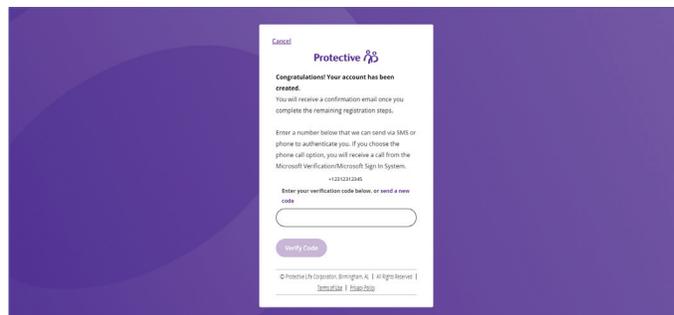
Send Code **Call Me**

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Step 7:

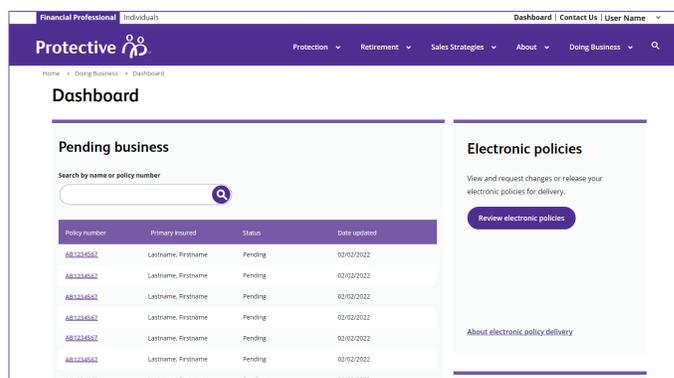
Complete verification.

- For texts:
Enter verification code sent via text
Click **Verify code**
- For phone calls:
Follow the automated prompts



Step 8:

New user is redirected to the FinPro dashboard.



Moving an existing user account to FinPro

As a financial professional who had a MyProtective account, you will need to set up your FinPro account. Use the step-by-step guide below to navigate through the process. If you have not accessed your MyProtective account since Jan. 1, 2023 you will need to register your account by following the instructions above.

Step 1:

Navigate to finpro.protective.com/access-new-site. Start by entering your MyProtective credentials.

Click **Next**

If you do not remember your MyProtective credentials, navigate to the FinPro login page (finpro.protective.com/doing-business/dashboard) to register.
Click **Proceed with registration**

Move to new site experience

We've introduced a new site experience for financial professionals. To access it, start by entering your MyProtective credentials.

Username: *

Password: *

Next

Step 2:

Provide your email.

Click **Send verification code**

Move to new site experience

Please provide the email address you'd like to use for this new experience. We'll email you a verification code for authentication.

Send verification code

Step 3:

Enter verification code.

Click **Verify code**

Move to new site experience

Enter the verification code that was sent to: username.3264-123456789@protective.com.

Enter your verification code, or [Send a new code](#)

Verify Code

Step 4:

Enter and confirm new password.

Click **Next**

Move to new site experience

Please create a password for this new experience.

Password must have:

- between 10 and 64 characters
- at least one lowercase letter
- at least one uppercase letter
- at least one digit
- at least one symbol

Create a new password

Confirm new password

Next

Step 5:

Complete account set up.

Move to new site experience

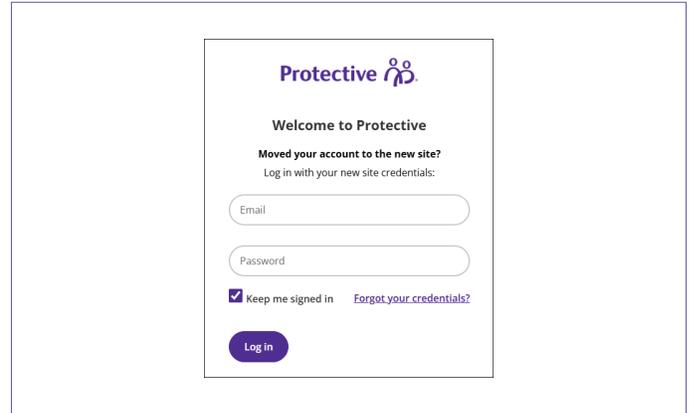
Complete account setup by logging in to the new site experience with the credentials you just created.

Complete account setup

Step 6:

Log in with your new site credentials.

Click **Log in**

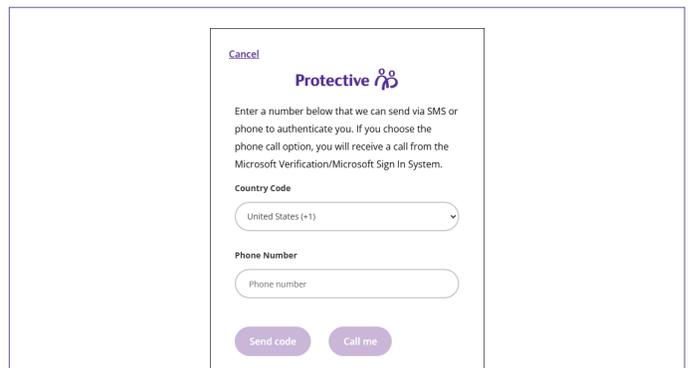


The screenshot shows a login form titled "Protective" with the subtitle "Welcome to Protective". Below the title, it says "Moved your account to the new site? Log in with your new site credentials:". There are two input fields: "Email" and "Password". Below these fields, there is a checkbox labeled "Keep me signed in" which is checked, and a link "Forgot your credentials?". At the bottom of the form is a "Log in" button.

Step 7:

Enter a number to authenticate you.

Choose **Send code** or **Call me**

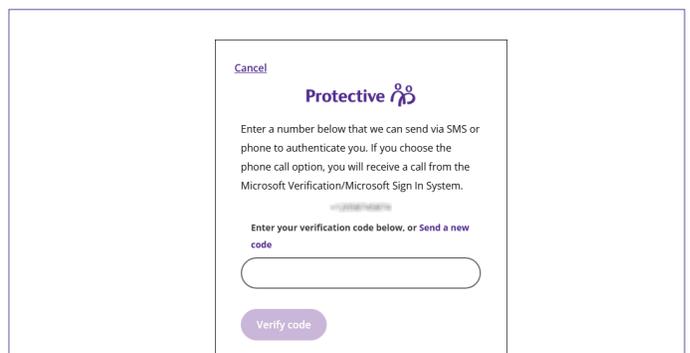


The screenshot shows a screen titled "Protective" with a "Cancel" link at the top left. The main text says "Enter a number below that we can send via SMS or phone to authenticate you. If you choose the phone call option, you will receive a call from the Microsoft Verification/Microsoft Sign In System." Below this is a "Country Code" dropdown menu with "United States (+1)" selected. There is a "Phone Number" input field. At the bottom are two buttons: "Send code" and "Call me".

Step 8:

Enter your verification code.

Click **Verify code**



The screenshot shows a screen titled "Protective" with a "Cancel" link at the top left. The main text says "Enter a number below that we can send via SMS or phone to authenticate you. If you choose the phone call option, you will receive a call from the Microsoft Verification/Microsoft Sign In System." Below this is a "Verify code" input field. At the bottom is a "Verify code" button.

Delegating account access to other users on FinPro

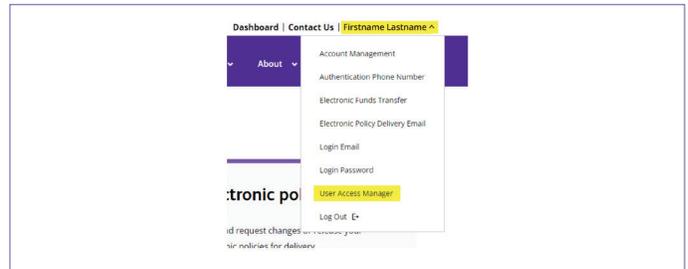
The sub-user maintenance feature is now the enhanced user access manager. With this update, financial professionals can grant access to other financial professionals and back-office personnel, support multiple users with a single login and easily edit or remove existing users. Use the step-by-step guides below to help them through these processes.

Inviting other users to access a FinPro account

Step 1:

Navigate to the user access manager from the logged in advisor's name tab on the FinPro dashboard.

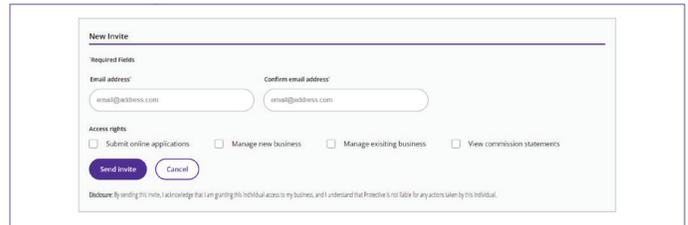
Click **New invite**



Step 2a:

If inviting an existing user, enter their email address and select access rights.

Click **Send invite**



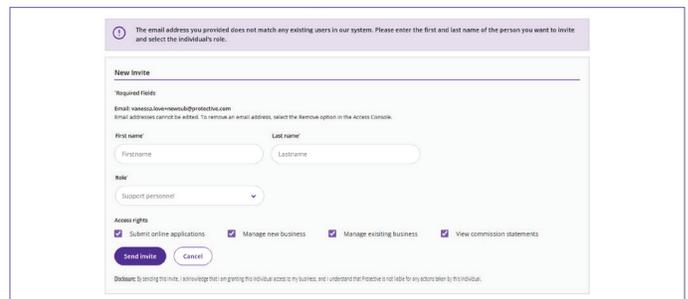
Step 2b:

If inviting a new user, enter their email address and select access rights.

Click **Send invite**

When prompted, enter their full name and role.

Click **Send invite** again



Step 3:

View the statuses of invited users from the user access manager.

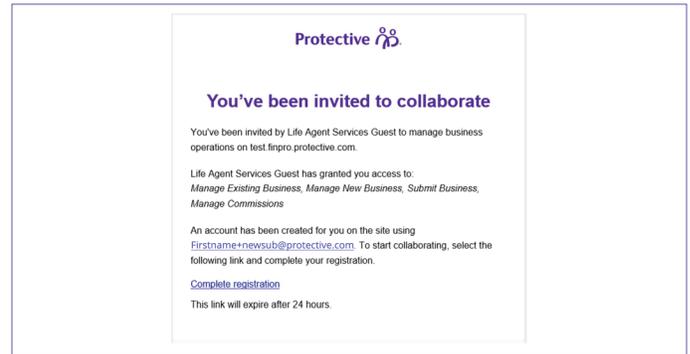


Accessing another user's FinPro account

Step 1:

Access the invitation sent via email.

Click **Complete registration**



Step 2:

Enter and confirm new password.

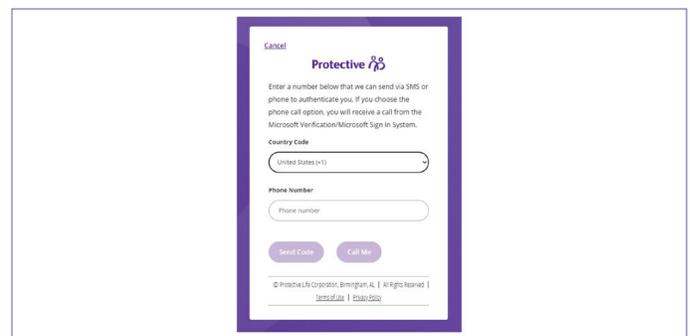
Click **Next**



Step 3:

Enter phone number for multi-factor authentication.

- Click **Send code** to receive a text
- Click **Call me** to receive a phone call

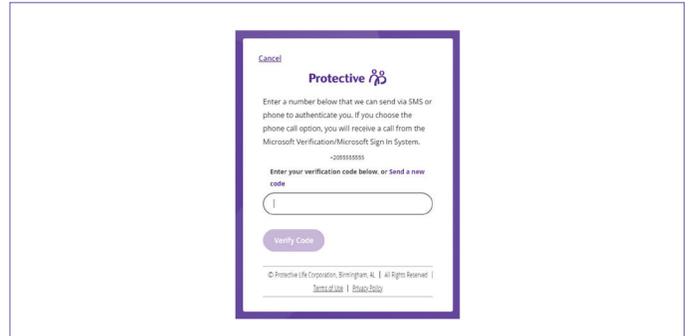


Accessing another user's FinPro account (cont.)

Step 4:

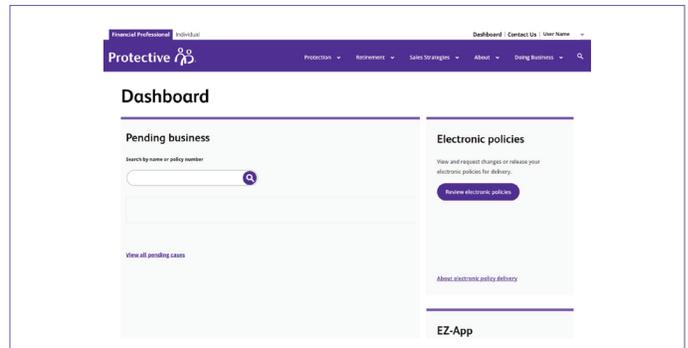
Complete verification.

- For texts:
Enter verification code sent via text
Click **Verify code**
- For phone calls:
Follow the automated prompts

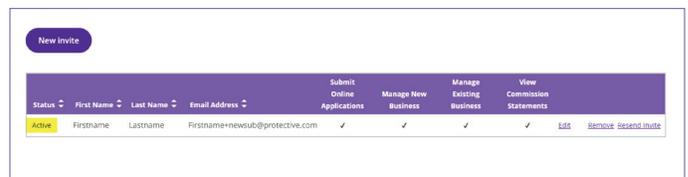


Step 5:

User is redirected to the FinPro dashboard.



Status in the user access manager is set to active.



Editing, removing or re-inviting a user

Editing a user:

Navigate to the user listed in the user access manager dashboard.

Click **Edit**



New Invite									
Status	First Name	Last Name	Email Address	Submit Online Applications	Manage New Business	Manage Existing Business	View Commission Statements		
Active	Firstname	Lastname	Firstname+newsu@protective.com	✓	✓	✓	✓	Edit	Remove Resend Invite

Removing a user:

Navigate to the user listed in the user access manager dashboard.

Click **Remove**

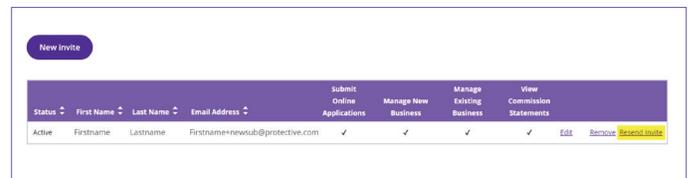


New Invite									
Status	First Name	Last Name	Email Address	Submit Online Applications	Manage New Business	Manage Existing Business	View Commission Statements		
Active	Firstname	Lastname	Firstname+newsu@protective.com	✓	✓	✓	✓	Edit	Remove Resend Invite

Re-inviting a user:

Navigate to the user listed in the user access manager dashboard.

Click **Resend invite**



New Invite									
Status	First Name	Last Name	Email Address	Submit Online Applications	Manage New Business	Manage Existing Business	View Commission Statements		
Active	Firstname	Lastname	Firstname+newsu@protective.com	✓	✓	✓	✓	Edit	Remove Resend Invite



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