



Are you using the P&A app?

For better or worse, we live in a world that is becoming more digital by the day. Paper statements and paper money are losing their overall appeal as the convenience of electronic statements and online payments proliferate.

For the last five years, we've offered our clients access to their account information 24/7 via a secure online portal. 75% of our clients now have an active client portal, which is a high adoption rate by industry standards.

Last year, we launched the Pittenger & Anderson app in the [App Store](#) and on [Google Play](#). Of the 75% of our clients with an active portal, 34% now access their P&A account information through our app. Over time, we expect these adoption rates to trend higher.

In order to utilize the P&A app, you must be a current P&A client and have an active client portal. If you'd like help setting up your portal and/or activating the P&A app, please [contact Kristin](#) in our office.

What will the P&A app allow me to do?

- Easily access the same information that appears on your P&A client portal, including account balances, current holdings, asset allocation, performance, annual income, and recent transactions.
- View and retrieve documents posted to your client portal, including quarterly statements and billing notices.
- Contact any P&A team member directly from the Service Team link on the app.

How do I get the P&A app?

- Navigate to the Google Play/Apple App Store on your phone.
- Search for "Pittenger." Look for the P&A logo.
- Click on the "Install" or "Get" button. You may be required to enter your Apple App Store password.
- Once you have downloaded the P&A app, click "Open."
- Enter your P&A client portal credentials. If you have forgotten your password, click the link at the bottom of the screen to reset your password.
- Click "Request Code." You can have a code emailed or texted to you to complete the two-factor login procedure. Once you receive the code, enter it in the P&A app. (Note: If you select "Remember This Device," you must go through the two-factor login procedure only one time.)
- Now you're logged in and ready to use the P&A app!

To ensure the P&A app works properly, install any system updates to your phone so that you have the most current operating system. Give Kristin a call if you encounter any issues!

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