



6 MERIDIAN

# *Adding a Mobile Account*

SAFARI ON IPHONE



# Add a Mobile Bookmark for Safari on iPhone

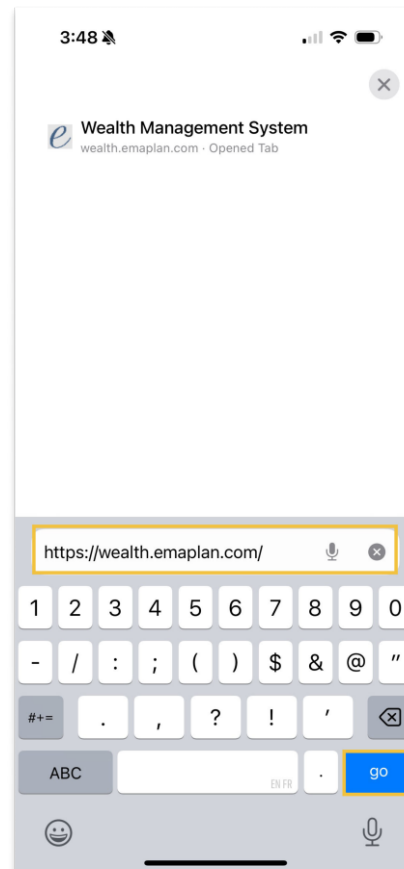
This user guide details how to add a mobile bookmark on your Client Portal login page from the default Safari app on your iPhone. This bookmark will provide quick and easy access from your device's Home screen.

## Note

To find the login URL, please reference the **confirmation email** that you received when you initially registered for your website access or contact your Advisor .

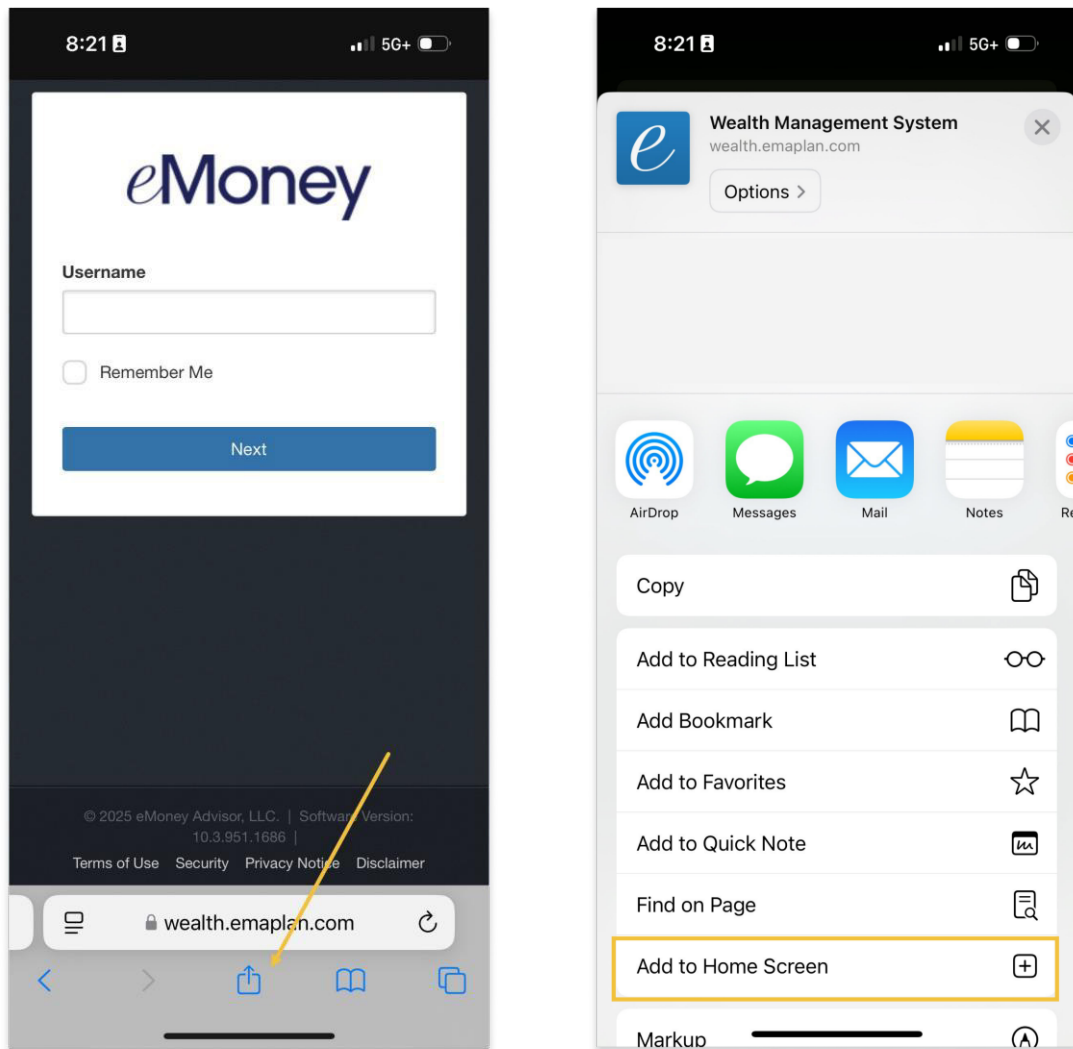
## Add a Mobile Bookmark

1. Locate and open the **Safari app** on your iPhone. Note that this icon may not appear in the same location on your phone as it is shown here. Enter the **login URL** provided to you by your Advisor, then tap **go**.



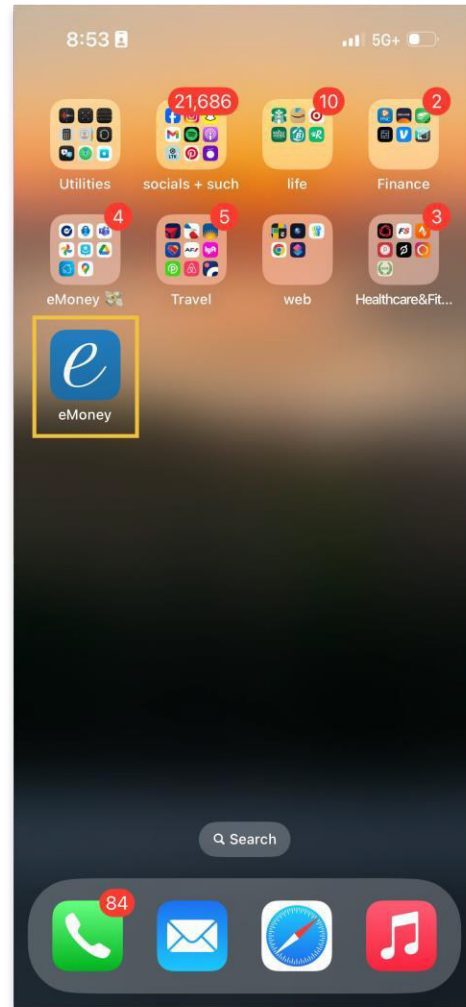
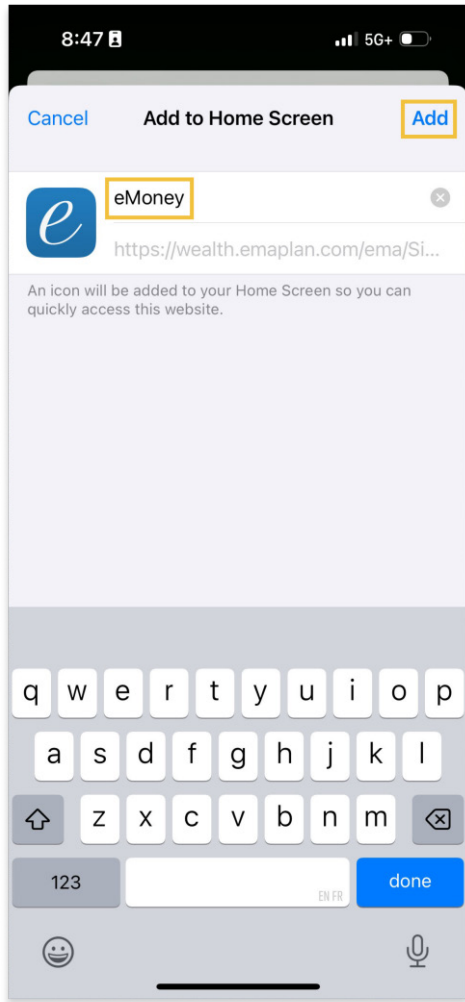
# Add a Mobile Bookmark for Safari on iPhone

2. Tap the **box and arrow icon** at the bottom of your screen. Then tap **Add to Home Screen**.



# Add a Mobile Bookmark for Safari on iPhone

3. If desired, you can edit the name of the bookmark. Tap **Add** when complete. Your mobile bookmark for your Client Portal will now be visible on your home screen.



## **Note:**

If you are experiencing issues with the mobile website displaying properly, it might be due to blocked cookie settings. To check this on your device go to **Settings** > **Safari** and make sure **Block All Cookies** is toggled off. After updating the setting, close Safari and log back into the mobile website .



6 M E R I D I A N . C O M

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Source: eMoney, 3/3/2026

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