

ValuesAdvisor

CREATED BY INVESTORS FOR INVESTORS

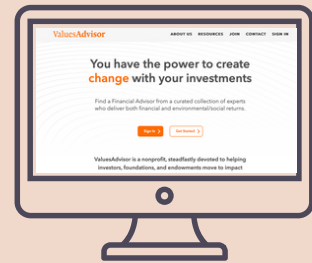
How to Get Started with ValuesAdvisor

1

Visit the Website

Go to:

[https://www.valuesadvisor.org/
createaccount](https://www.valuesadvisor.org/createaccount)



2

Create Your Account

Enter name, email, and create a password

A screenshot of the "Let's Get Started" registration form. The form asks for "FIRST NAME" and "LAST NAME" with input fields. It includes a question "ARE YOU AN INSTITUTIONAL INVESTOR?" with radio buttons for "Yes" and "No". Below that are fields for "EMAIL ADDRESS", "CREATE PASSWORD", and "CONFIRM PASSWORD".

3

Enter Your Partner Code

Enter your organization's access code for complementary access

A screenshot of the "PARTNER CODE" entry form. It includes a text input field labeled "TESTCODE" and a green "APPLIED" button. Below the input field, there is a success message: "Success! Click the Confirmation button below to complete your registration." and a "Confirmation" button with a right-pointing arrow. A small privacy notice is also visible at the bottom.

4

Explore Advisors

Use filters to sort by impact themes, services, location, and more. You're in control

A screenshot of the advisor search filters. It shows a range slider for account size from 250K to 100M. Below the slider are several filter categories with dropdown arrows: "FIRM SIZE (AUM)", "GEOGRAPHY", "SERVICES", "ASSET CLASS", "IMPACT THEMES", "LEADERSHIP DIVERSITY", "TEAM DIVERSITY", and "ACTIVE OWNERSHIP".

5

Watch the Quick Start Video

Prefer a quick walk-through? Check out our 2-minute preview: <https://valuesadvisor.org/resources>



Need help?

**Email ValuesAdvisor at info@valuesadvisor.com
We're happy to support you.**