

Heritage Client Portal Security Enhancement

Dual Factor Authentication (DFA) Set-Up

Please follow the steps below to initiate dual factor authentication.

Step 1 - [Click here](#) to access the Client Portal

Step 2 - Enter your login information

Step 3 - Follow the prompts to establish 3 new security questions

Step 4 - Enter a cell phone number to receive a one-time passcode via text message

Step 5 - Enter the passcode in the box provided to access the Client Portal

After the initial set-up is complete, the one-time passcode via text message will be the default method for accessing your account.

If you have any questions or difficulties, please contact our team for assistance.

As always, we appreciate your continued support and are committed to providing the best possible service to our clients. Thank you!