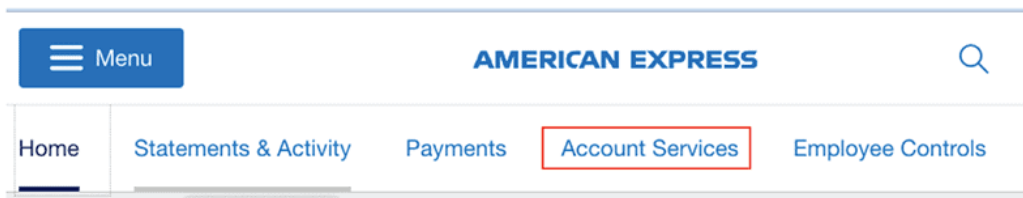


AMEX - Adding an Account Manager

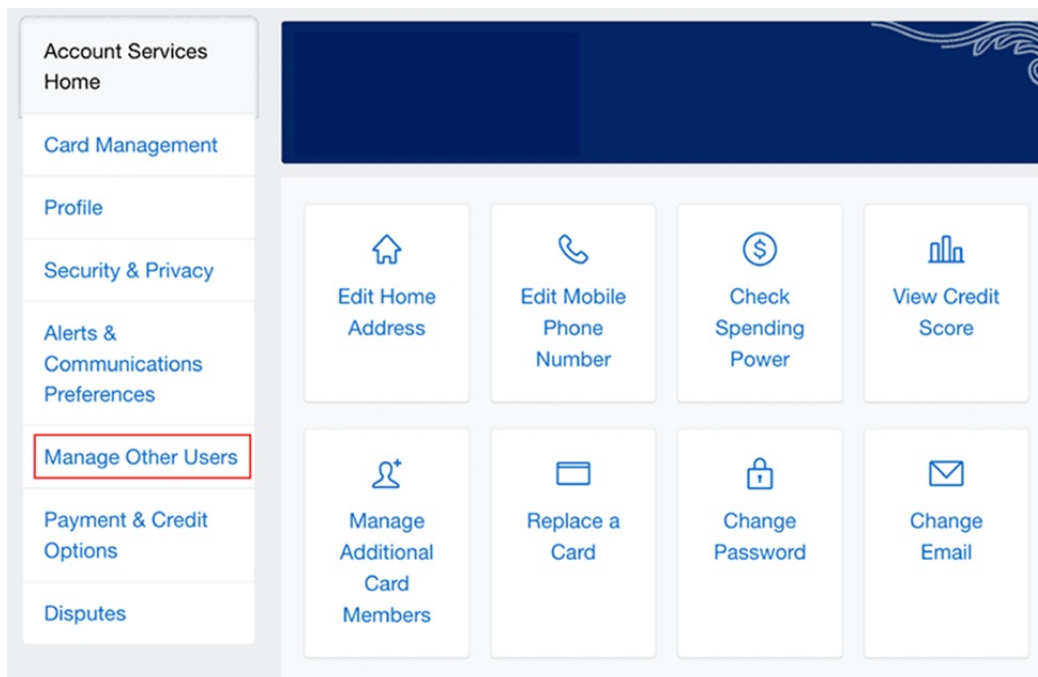
06/25/2025 11:20 am PDT

The following are step-by-step instructions on how to add us to your American Express account as an Account Manager.

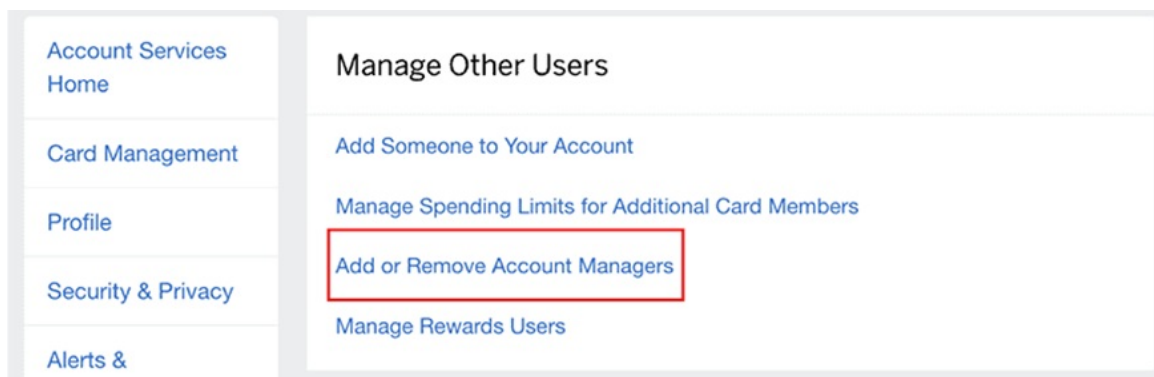
1. Login to Amex and click the Account Manager menu item on the top menu bar of your screen.



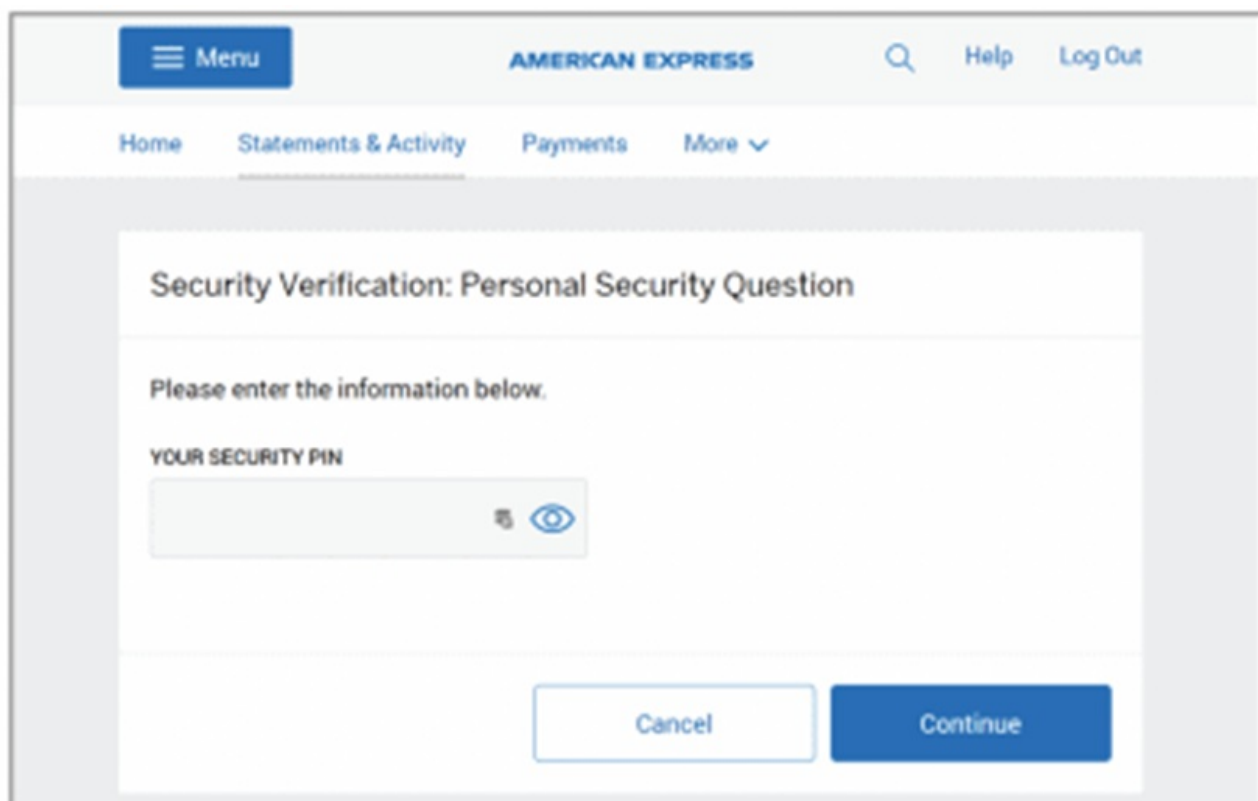
2. Click Manage Other Users



3. Click Add or Remove Account Managers



4. Enter Your PIN



5. Complete Two-Step Verification

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Security Verification: One-Time Password

Get a one-time password via text, email, or voice.

TEXT
message and data rates may apply
☐ *****

EMAIL
☐ j*****

6. Select your Access level. Precision Financial only Needs Limited Access.

Kindly refer to the email sent by our team that initiated this access request for the specified email address for you to direct all Account Manager requests to

If any other details are prompted, please use the following:

Name: **Wesley Lindquist**

Contact Number: **(619) 940 6526**

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American Express Gold Card

ACCOUNT ACCESS LEVEL

☐ Full Access

Give your Account Manager full access to act as your proxy and do most things on your account.
[Compare Levels](#)

☒ Limited Access

Give your Account Manager limited access to view statements, make payments, and dispute charges.
[Compare Levels](#)

ACCOUNT ACCESS OPTION(S)

☐ Travel Access

Give your Account Manager the ability to book and manage airline and

7. Please be sure to email us once you have sent out the account manager's email so we can be on the lookout for it.