AccessMyPortfolio
MOBILE APP - INVESTOR GUIDE
AccessMyPortfolio.com

SEI New ways. New answers.®

GETTING **STARTED**

1. Search and download the **AccessMyPortfolio** app from your App Store (iOS and Android supported). Once downloaded, open the app and the login page will display.
2. Enter your **user ID** and p**assword** in the u**ser name** and p**assword** fields. Select c**ontinue.**
3. Enter the **one time password** into your mobile device to verify that the device is yours. This **one time password** will be sent to your registered email address with AccessMyPortfolio.com.
4. For faster and easier login in the future, do one of the following:
   - Enter a 4 digit pin
   - Enable Touch ID (if your device permits)
   - Enable Face ID (if your device permits)

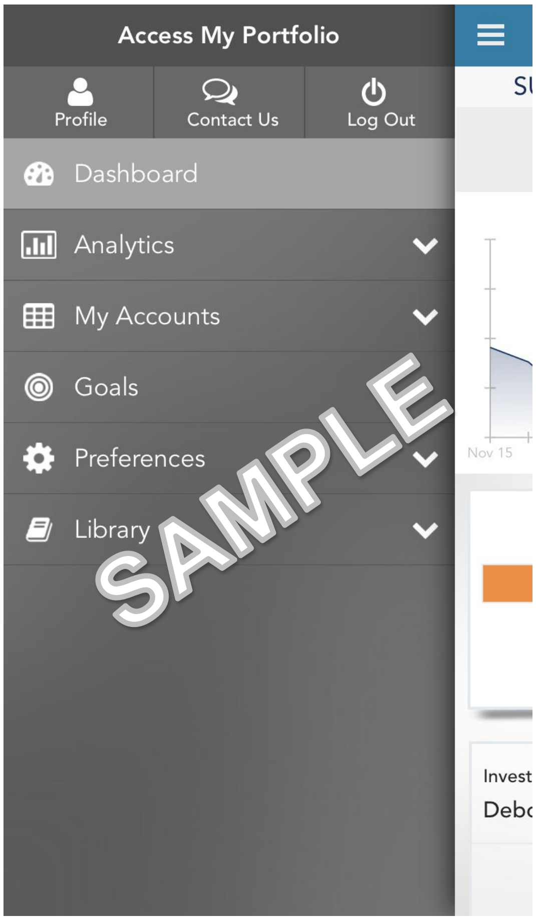
QUICK **REFERENCE**

For your ongoing use of AccessMyPortfolio, read more about each section below:

1. **Navigation**
2. **Dashboard**
   - Summary of account information (Market Values, RMD, Cash Access Accounts, How My Money Is Invested)
3. **Analytics**
   - How My Money Is Invested
   - My Investments Value Over Time
   - Investment Performance
4. **My Accounts**
   - Transactions
   - Investments
   - Cash Access Accounts
5. **Goals**
6. **Preferences**
7. **Library**

1. Navigation

The **Main Menu** icon at the top left of the page allows you to navigate throughout the application. From here you will be able to access the **Dashboard, Analytics, My Accounts, Goals, Preferences** and **Library** pages. You will also be able to view your profile, the contact us information and log out button.



2. Dashboard

The **Dashboard** is the first page that is viewed after logging in. It provides a summary of account details within the app, such as:

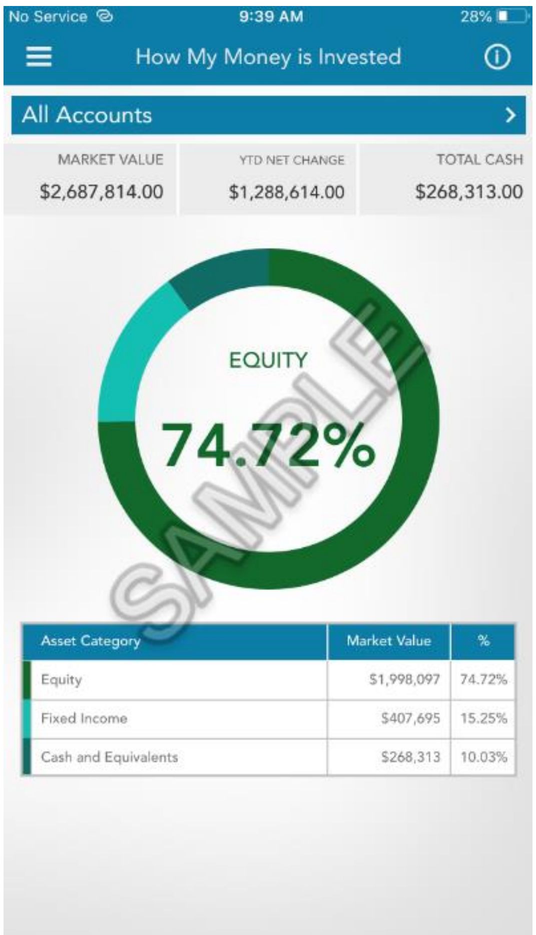
- Investment Value Over Time
- RMD Information (If applicable)
- Cash Access Checking Account (If applicable)
- Linked Accounts (Accounts that you have access to, but are not an owner)
- How My Money Is Invested

3. Analytics

The **Analytics** page provides details about your investments:

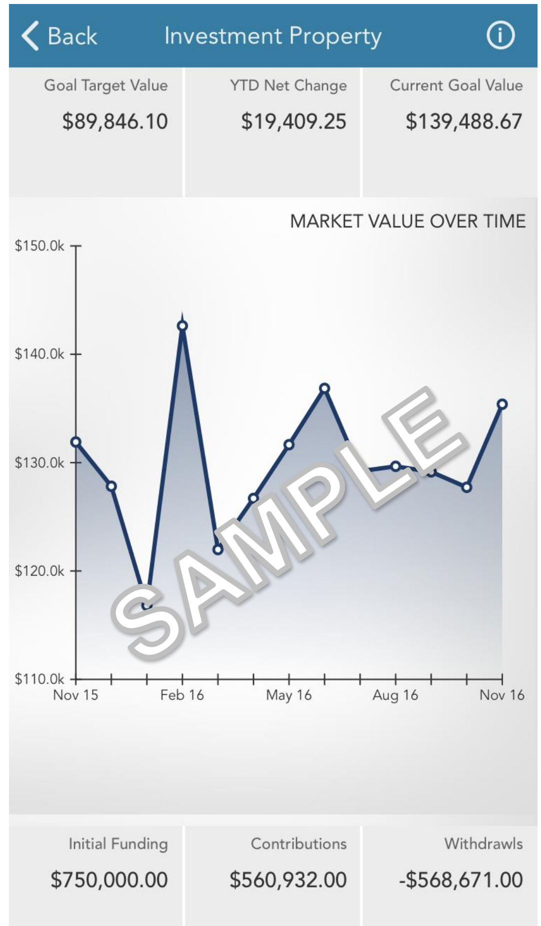
- How My Money Is Invested
- My Investments Value Over Time
- Investment Performance

How My Money Is Invested will show you your market value, YTD net change, total cash as well as a breakdown of what asset categories you are invested in. You are able to view all of your accounts or a single account by pressing the account selector at the top of the screen.



My Investments Value over Time provides a graph of historical market values of your accounts. You are able to view all of your accounts or a single account by pressing the account selector at the top of the screen.

For a larger view of the chart, rotate your phone horizontally.



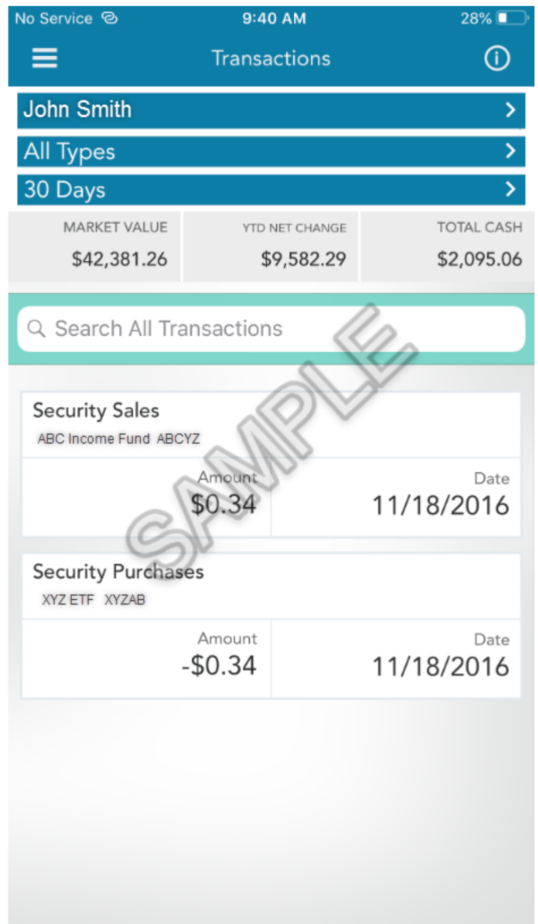
Investment Performance will show you your portfolio's performance as of your last month end performance return. This will be updated approximately ten business days after month end. For a more extended view, rotate your phone horizontally.

4. My Accounts

The **My Accounts** menu will provide details of various account activities including:

- Transactions
- Investments
- Cash Access Accounts

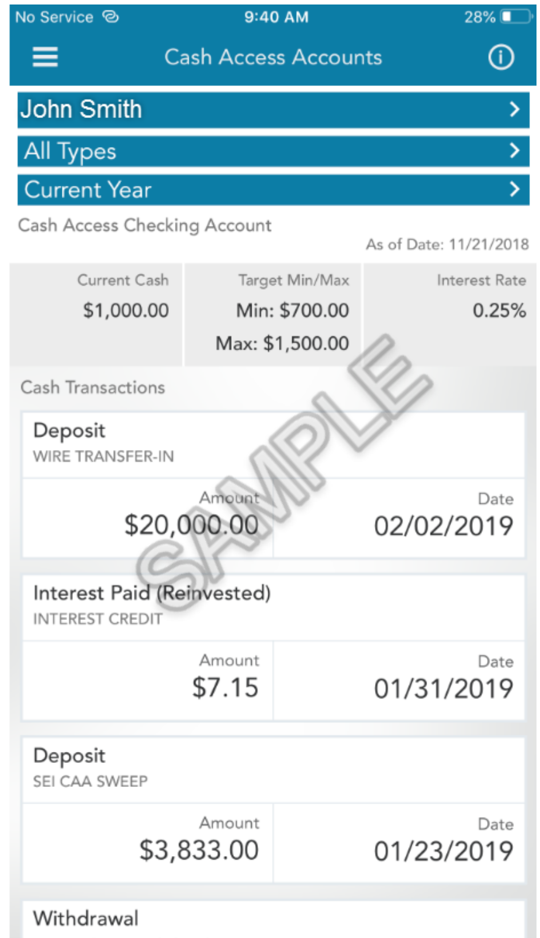
Transactions provide a summarized view of the transactions on your account(s). To change the account you are viewing, the types of transactions or time period, you can use the filter dropdowns at the top of the screen. You can also search for a transaction in the list by typing in the search box under the filters. For a more extended view, rotate your phone horizontally.

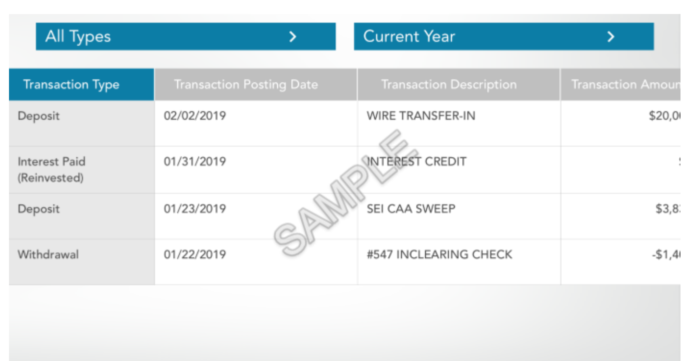


The **Investments** page displays the asset held within your accounts. You can view all of your accounts, or a single account by choosing an option in the account selector. For a more detailed view of your investments, rotate your phone horizontally.

The **Cash Access Accounts** page will give you details into your linked cash access account or Securities Backed Line of Credit if you have one.

Details for cash access accounts include current cash amount, target minimum and maximum and interest rate. You will also be able to access transactions for the cash access account. You can use the filter drop downs at the top of the page to change accounts, transaction types and date range. For a more extended view, rotate your phone horizontally.



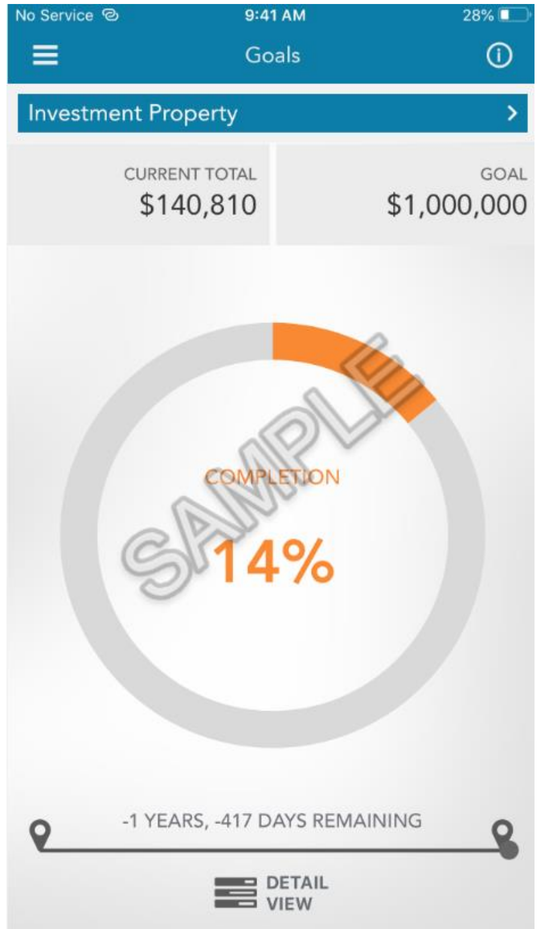


(Cash Access Accounts continued)

Details for Securities Backed Line of Credit accounts include commitment amount, used amount and interest rate. You can change the SBLOC account being viewed by choosing the account selector at the top of the page.

5. Goals

The **Goals** page will provide a summary of your progress towards goals if they are assigned to any of your investment accounts. If you have multiple goals, you can switch between goals using the goal selector dropdown at the top of the page.



Click on the **Detailed View** to see each goal individually. The Detailed View displays the list of accounts and portfolios that make up the goal, any additions and withdraws made and the goal initial funding. For a more detailed view, rotate your phone horizontally.

(Goals continued)

6. Preferences

The **Preferences** menu will allow you to select settings for viewing your accounts. Here, you can choose to hide or show linked accounts in your views.

7. Library

The **Library** provides the sites disclaimer as well as a glossary of terms used within the AccessMyPortfolio.com application.