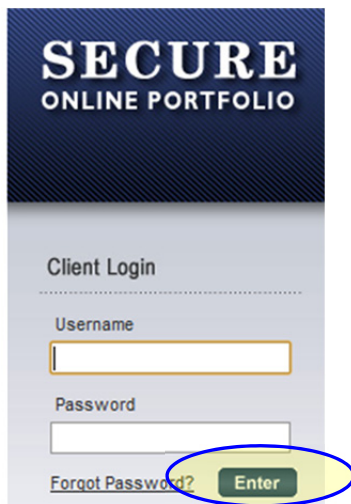



SECURE ONLINE PORTFOLIO | New User Registration Guide

Getting Started

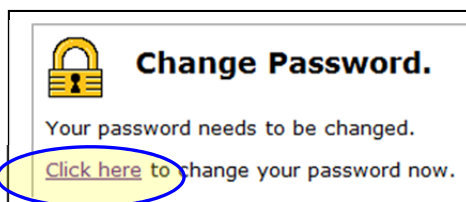
You should have received two separate emails containing your login information, one with your username and another with your temporary password. Please follow the instructions below to register for our Secure Online Portfolio.



Open your preferred internet browser and go to <https://www.ourclientportal.com>

- Under the section “Client Login”
 - Enter your username
 - Enter your temporary password
 - Click 

You will be redirected to the Disclosure Information page. Please review it carefully and choose “**I Agree**” to proceed to the next step. (If you disagree with any aspect of our Disclosure Information, you may choose “**I Decline**” and will be logged out of the system.)



Once you select “**I Agree**” on the Disclosure Information page you will be redirected to the “Change Password” screen. Click “**Click here**” to continue. For your security, we ask that you change your temporary password to a permanent, secure password.

Password Change

Enter your old password:

Enter your new password:

Re-enter the new password to confirm:

To change your temporary password:

- Enter your current password
- Enter your new password*
- Re-enter your new password
- Click **“Change Password”**

***IMPORTANT NOTE:** Each of the password requirements at the right hand side of the screen must be met before your new password is accepted. As each requirement is met, the triangular symbol with an exclamation point will change to a green circle with a checkmark inside. What is a special character? A special character is a symbol that is neither a letter nor a number. To view specific examples, such as ? ! , @ # \$ % &, click on the “special character” link.

Password Requirements

- ⚠ Minimum Length: 8
- ✅ Maximum Length: 25
- ✅ Must contain a letter(a-z, A-Z)
- ⚠ Must contain a number(0-9)
- ⚠ Must contain a [special character](#)
- ⚠ Confirm Password matches New Password

NOTE: All passwords are case sensitive

Password Change

Password Changed Successfully

[Click here to continue](#)

Once your password has been changed, please click the “here” to continue. This link will take you back to the login screen. Once you return to the login screen, login using your username and new password. You will then be asked to register three security questions.

Security Question Registration

You can reset your own password if you have forgotten yours. Select your security questions below and provide your secret answers. These questions will be used if you need to reset your password.

Question:

Answer:

Question:

Answer:

Question:

Answer:

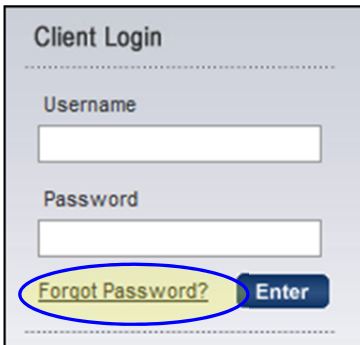
To create your security questions:

- Select a question from the drop-down menu
- Enter your answer (not case sensitive)
- Repeat steps 1 and 2 for the second and third question.
- Click **“Register”**

Congratulations! Your new user registration for the Secure Online Portal is complete.

SECURE ONLINE PORTFOLIO | Password Retrieval

Forgot Password?



Client Login

Username

Password


[Forgot Password?](#)

If you have forgotten your password, you can always have it reset using your security questions.

In an internet browser, go to <https://www.ourclientportal.com>. Click “**Forgot Password?**”

Step 1: On the **Password Reset Screen**, Enter your **username** and click “**Next...**”



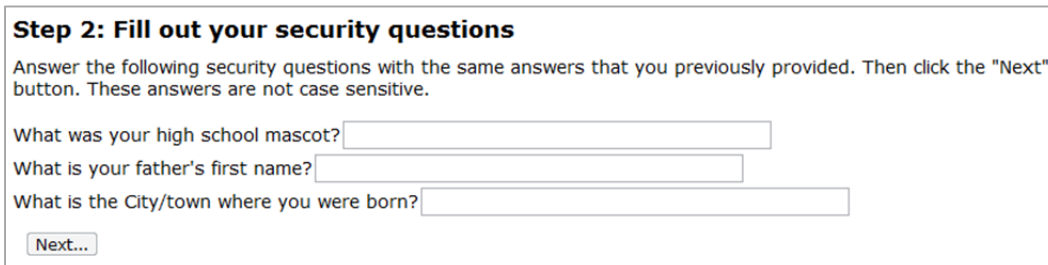
 **Password Reset**

Use the following wizard to reset your password

Step 1: Enter your User ID

User ID:

Step 2: Fill out your security questions listed below and click “**Next...**”



Step 2: Fill out your security questions

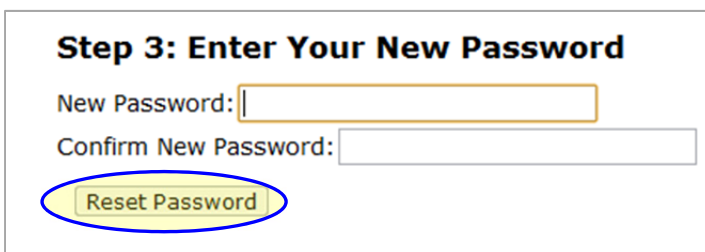
Answer the following security questions with the same answers that you previously provided. Then click the "Next" button. These answers are not case sensitive.

What was your high school mascot?

What is your father's first name?

What is the City/town where you were born?

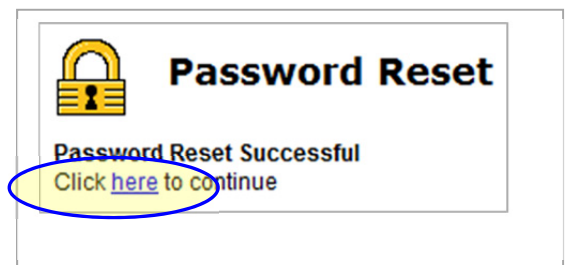
Step 3: Enter your new password on the first line, re-enter your new password on the second line, and click “**Reset Password**”. (Remember passwords should be 8-25 characters in length and should contain a special character such as ? ! , , # \$.)




Step 3: Enter Your New Password

New Password:

Confirm New Password:



 **Password Reset**

Password Reset Successful

Click [here](#) to continue

Your password has now been reset!
You can now login with your new password.

Click “**here**” to be redirected to the login page.

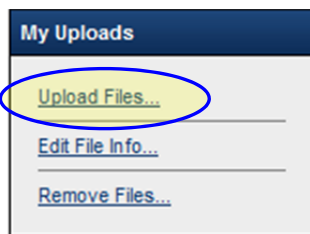
SECURE ONLINE PORTFOLIO | Uploading Documents

Uploading Documents

The **My Uploads** section is where you and your consultant can securely upload, view, and share documents.

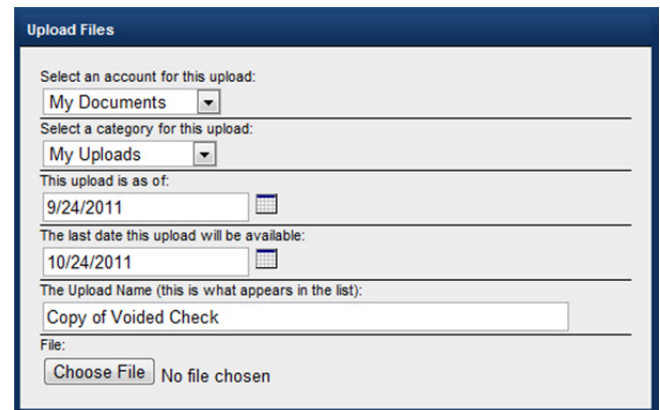
To upload a document:

1. Hover your mouse over the “**Document Center**” tab on the toolbar; click “**My Uploads**”
2. Go to “**My Uploads**” at bottom right corner. Click “**Upload Files...**”



3. In the pop-up screen, complete the following as indicated:

- Select an account for this upload: *My Documents*
- Select a category for this upload: *My Uploads*
- Select date (ex. date of document)
- The last date this upload will be available: expiration date of the uploaded document, i.e., if you choose tomorrow’s date, then after tomorrow, the file will be removed from the portal**
- The Upload Name: Name of the document
- Choose File: document to be uploaded



Upload Files

Select an account for this upload:

Select a category for this upload:

This upload is as of:

The last date this upload will be available:

The Upload Name (this is what appears in the list):

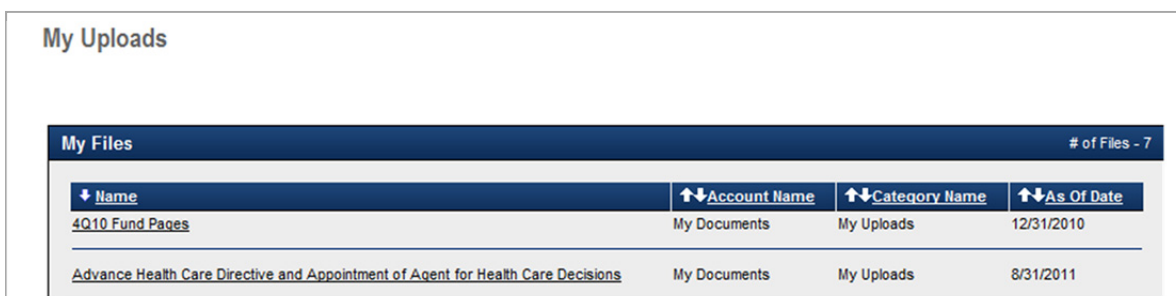
File:
 No file chosen

****IMPORTANT NOTE:** Please carefully consider your selection for the “last date this upload will be available.” Once documents become unavailable or expire, they are completely removed from our system and cannot be retrieved.

4. Click “**Upload.**” The document you selected has now been uploaded to **My Uploads**.

To view an uploaded document:

1. Move your mouse over the “**Document Center**” tab on the toolbar; click “**My Uploads**”
2. Click the name of the file under the “**Name**” column.

My Files				# of Files - 7
Name	Account Name	Category Name	As Of Date	
4Q10 Fund Pages	My Documents	My Uploads	12/31/2010	
Advance Health Care Directive and Appointment of Agent for Health Care Decisions	My Documents	My Uploads	8/31/2011	