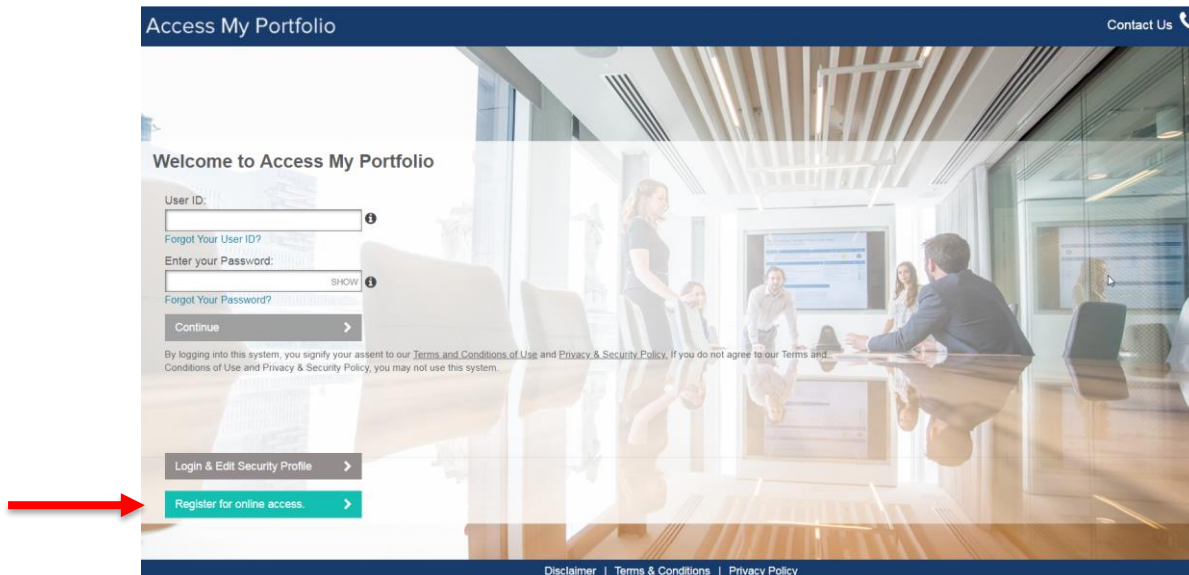


# AccessMyPortfolio.com Self-Registration Procedures

**SEI** New ways.  
New answers.®

SEI will provide all eligible clients with an automated email advising them that they can proceed with the self-registration process once SEI has received all required client information. Please note that if you are a 3<sup>rd</sup> party to an account, and not an account owner, you must first contact the account owner and advisor to complete the required [www.AccessMyPortfolio.com](http://www.AccessMyPortfolio.com) form. This form requires the account owner's and/or authorized signor's signature in order to grant access to their account.

- 1) Visit [www.accessmyportfolio.com](http://www.accessmyportfolio.com) and select **Register for online access** link.



- A. REGISTER AND SET UP ONLINE ACCESS FROM YOUR COMPUTER OR TABLET (*Cannot set up from phone*)
- B. Before proceeding further, wait until you receive an email from [noreply@seic.com](mailto:noreply@seic.com)
  - You should receive the email a few minutes after clicking “**Register for online access**”
  - Check Spam/Junk Folder if you do not see the message in your Inbox
  - Receiving this email confirms that you can begin with the registration process

- 2) Fill in your **last name**, **last four digits of your tax ID**, **date of birth (mm/dd/yyyy)**, **postal code**, and **your email address**. Your email address must be the email address on file with SEI Private Trust Company. Select **Continue**.

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**Help us identify your account.**  
All information is required

Last Name

Date of Birth (mm/dd/yyyy)

First 5 Digits of ZIP Code

Last 4 Digits of Social Security Number

Email Address

[Continue](#)

[Disclaimer](#) | [Terms & Conditions](#) | [Privacy Policy](#)

- 3) Create your **user ID** and select **Continue**.

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**Create New User ID.**  
Your user ID must be unique and can contain most alphanumeric characters.

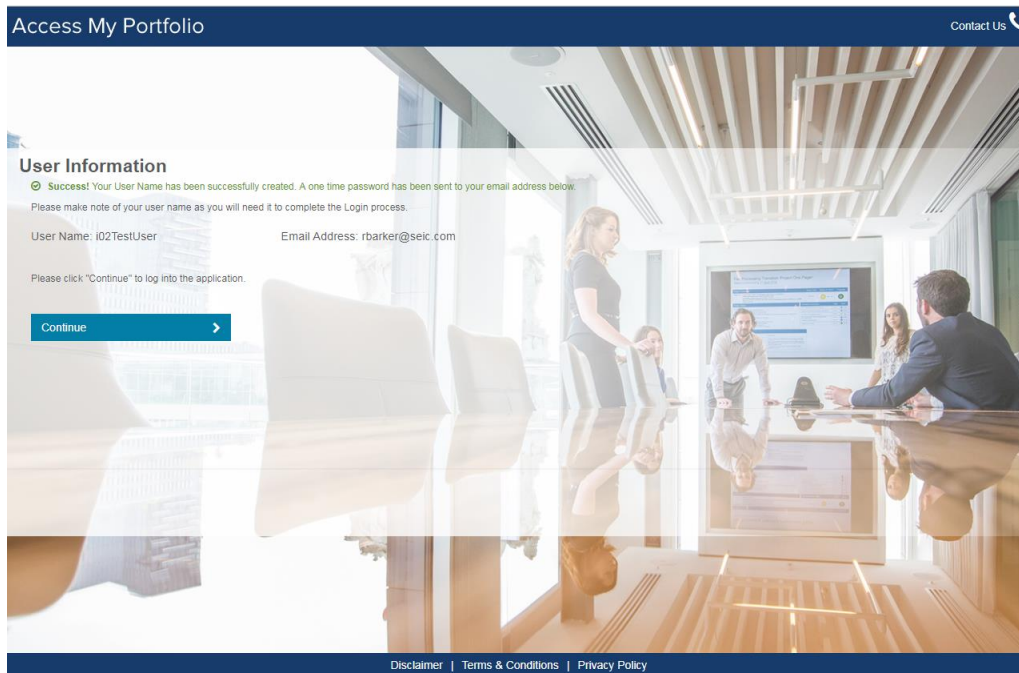
Create User ID

[Continue](#)

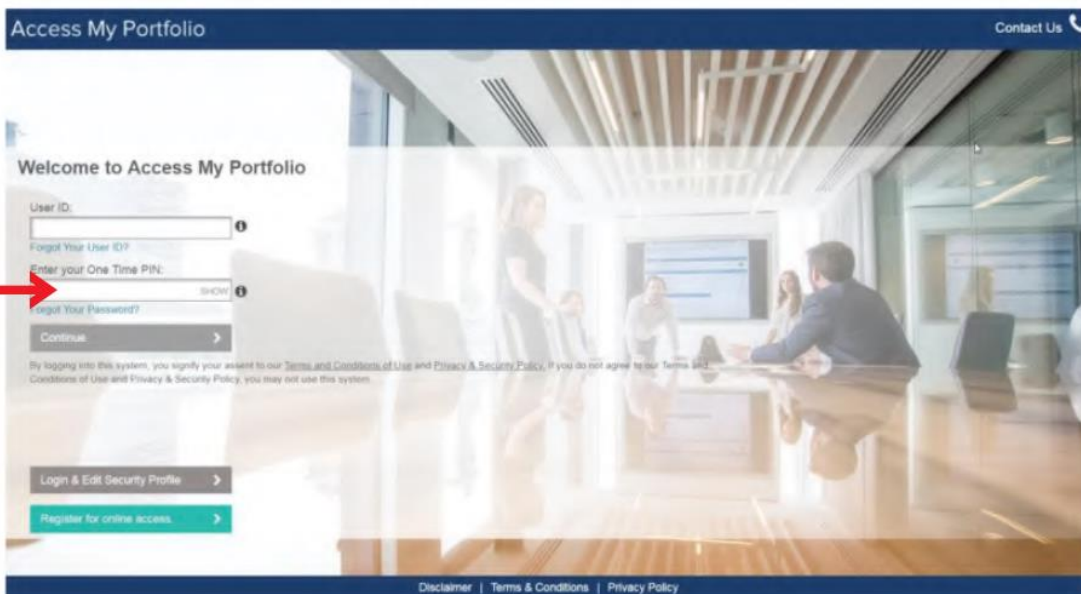
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**NOTE: THIS MAY TAKE A FEW MINUTES AS THE SYSTEM IS CHECKING TO MAKE SURE YOUR USER ID HAS NOT PREVIOUSLY BEEN USED. DO NOT REFRESH YOUR BROWSER.**

- 4) Upon receiving the successful username creation message, select **Continue to log in**. A **one-time pin** has been sent to the email address you entered. You will be prompted to enter the pin when logging in for the first time.



- 5) Enter your **User ID** and **one-time pin**. Select **Continue**.



Until you put in your USER ID, it will read "Password" here.



- 6) Scroll through and read the **Terms and Conditions**. Select the box in Step 2 to accept the **Terms and Conditions**. Select **Continue**.

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### Welcome i02testuser

**STEP 1:** Scroll down and view all Terms and Conditions first.

During the enrollment process, you will be asked to provide answers to security questions and a valid phone number. This information will be used as part of our multi-factor authentication process to ensure the safety and security of your information. If you are logging in from an unrecognized device, you will be prompted to select a method for a secondary security factor. You may choose to answer two security questions or receive a one-time PIN via email, SMS Text, or voice call. Once the secondary factor is verified, you will successfully log into the website.

By enrolling into this enhanced login process and logging into this system, you signify your assent to the login process and to the Terms and Conditions made available on the footer of each page. Please contact your System Administrator if you encounter any problems. Thank you.

**STEP 2:** ☒ Click here to accept the Terms and Conditions.

[Continue](#)

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- 7) Enter a valid **phone number** to receive a text or voice message for a one-time pin in the event of an account lockout, if you forgot your password, or if you are accessing your account from an unregistered device. Select five **security questions** and provide **answers** to those questions. Select **Continue Login**.

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### Welcome i02testuser

Please enter your country and valid phone number if you want to receive One-time PIN as a text or voice message. Contact your System Administrator if you encountered any problems. ⓘ

Type:  Country:  Phone Number:

Type:  Country:  Phone Number:

Please select your Security Questions and Answers. ⓘ

Question #1 or [Create Custom Question](#)

Select or enter question #1...

Enter answer #1

Question #2 or [Create Custom Question](#)

Select or enter question #2...

Enter answer #2

Question #3 or [Create Custom Question](#)

Select or enter question #3...

Enter answer #3

Question #4 or [Create Custom Question](#)

Select or enter question #4...

Enter answer #4

Question #5 or [Create Custom Question](#)

Select or enter question #5...

Enter answer #5

[Continue Login](#)

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- 8) Create and confirm a **new password**. Passwords need to be 8-20 characters in length and must contain at least one (1) uppercase letter, one (1) lowercase letter, and one number. The password cannot contain the user's first or last name and may not have more than two repeating characters. Most special characters are supported, but "&", "<", ">", and spaces are not allowed. On this page, you also have the option to select "Remember this device" and by doing so, you will not have to answer security questions when logging into the site in the future. After completing these steps, Select **Continue Login**.

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Welcome [Name]

Please create and confirm your new Password.

Enter your new Password: [password field] SHOW

Confirm your new Password: [password field] SHOW

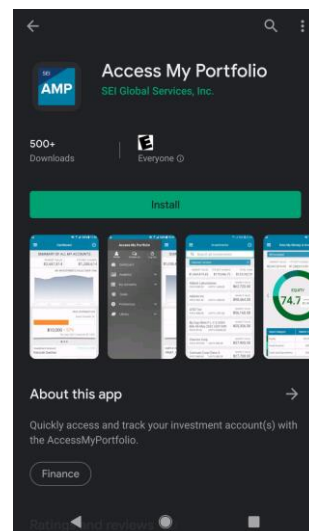
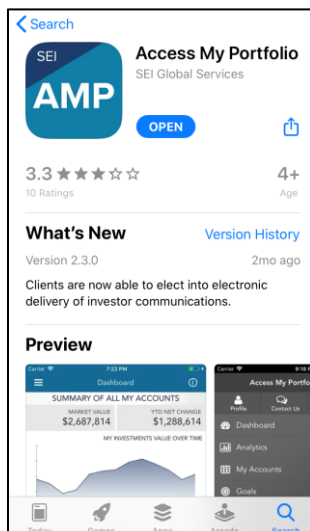
☒ Remember this device (not recommended for public computers)

Continue Login

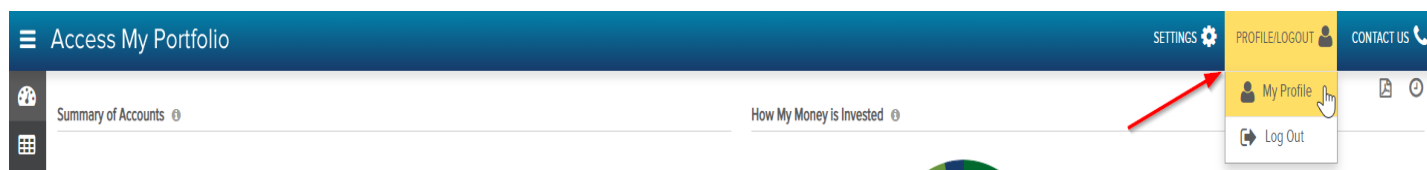
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- 9) Congratulations! You have officially set up your User ID with [www.AccessMyPortfolio.com](http://www.AccessMyPortfolio.com). Your financial advisor can provide you with website overview guides to help you get familiarized with the site.

\*\*\*After you have registered, you may want to use the AccessMyPortfolio App on your Apple or Android mobile device. Download the App by going to the Apple or Google Play App Store and search "access my portfolio"\*\*\*



- 10) As the last (optional) step of the set up process, if you would like to opt into **electronic delivery** of your various account documents (**statements, prospectus and/or proxy material**), start by clicking on PROFILE/LOGOUT in the top right-hand corner and then “My Profile.”




- 11) Once on “My Profile,” you can see whether you are signed up for Print or Electronic delivery for Prospectus, Proxy or Statement materials. For more questions on these items please contact your financial advisor. If you’d like to make changes to your Delivery Methods, check the appropriate boxes or choose the appropriate dropdown options (Print or Electronic) and click “Save Changes” in the bottom right-hand corner.

NOTE: If you switch from Print to Electronic Statements, you will be prompted to verify this via a pending email (See below “Your electronic delivery selection is pending your email confirmation”). This time, the email will be from [SEIPrivateTrust@seic.com](mailto:SEIPrivateTrust@seic.com). To verify the changes, click on the hyperlink in the email, which will automatically bring you back into [www.AccessMyPortfolio.com](http://www.AccessMyPortfolio.com). If done correctly, you will receive the message “Your statement delivery method has successfully been updated” highlighted on a green banner.




A screenshot of the 'My Profile' page in the 'Access My Portfolio' website. The page has a dark blue header with the same navigation links as the previous screenshot. The main content area is white. At the top, there's a section for 'My Profile' with fields for Name, Home Address, Primary Phone Number, and E-Mail Address. Below this is a section for 'Investor Communication Delivery Method' with three radio buttons: 'Deliver All Methods Electronically', 'Print All Documents', and 'Specify Different Methods'. The 'Specify Different Methods' option is selected. Under this, there are three sections: 'Prospectus', 'Proxy', and 'Statement'. Each section has a dropdown menu for the delivery method (Electronic or Print) and a text field for the email address. The 'Statement' section also includes a table with columns for Statement Name, Account Name & Number or Account Group, Recipient Name, Frequency, and Delivery Method. The table has one row for 'Advisor Standard' with the account name 'John O'Kaay Test', frequency 'Quarterly', and delivery method 'Electronic'. At the bottom right, there is a 'Save Changes' button with a red arrow pointing to it. At the bottom left, there is a 'Cancel' button. At the very bottom, there are links for 'Disclaimer', 'Terms & Conditions', and 'Privacy Policy'.

#### Investor Communication Delivery Method

 Go paperless today and benefit from the speed, convenience, and security of receiving your statements and shareholder materials electronically.

☒ Deliver All Methods Electronically

 Your electronic delivery selection is pending your email confirmation.

 Reply  Reply All  Forward



Thu 1/30/2020 2:18 PM

SEI Private Trust

SEI Online Statement Notification


To



**SEI** New ways.  
New answers.®



Dear Valued Client:


You have recently registered for electronic delivery of your SEI Private Trust Company statement(s). Please click the link below to complete the registration process. This registration must be accepted within the next 72 hours, or your documents will remain as print delivery. When selecting the hyperlink, please make sure you are logged out of Access My Portfolio.

<https://www.accessmyportfolio.com?consentEStatement=15697063&isFirmEmployee=0&firmId=81212&userId=UE81S1JpcGxleVRlc3Q=> 

 **Access My Portfolio**

 **My Profile**

 Your statement delivery method has been successfully updated.



Below is your profile information. You may update specific items by clicking the pencil icon 