

Evelyn Partners Online

User Guide

V1.5

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Contents

1.	Welcome to Evelyn Partners Online	1
2.	Accessing Evelyn Partners Online	2
2.1	Evelyn Partners online URL:	2
2.2	Login Security	2
3.	Registration	3
3.1	Email Notification	3
3.2	Step 1: Security code delivery channel	3
3.3	Step 2: Security details	4
3.4	Step 3: Personal Assurance Message & Image	5
3.5	Confirmation of telephone and mobile numbers for multi authentication channels	6
3.6	Evelyn Partners Terms & Conditions	6
3.7	Receive a registration email	6
3.8	Manage My Devices	6
4.	Logging in	8
4.1	How to access Evelyn Partners Online	8
5.	General Navigation	9
5.1	Layout	9
5.2	Overview	9
5.3	Reporting	11
5.4	Documents	15
5.5	Account Groups	20
5.6	Account Information	22
6.	Personal Settings	23
6.1	My Details	23
6.2	Change Password	23
6.3	Preferences	23
6.4	Phone, email, and device information	24
7.	Contact us	25
8.	Frequently asked questions	26
8.1	Who do I contact for help?	26
8.2	What do I do if I forget my password?	26
8.3	What do I do if I forget my User ID?	26

8.4	What do I do if I do not recognise my personal assurance picture and message?	27
8.5	How up to date is the information displayed on Evelyn Partners Online?	27
8.6	How secure is my information?	27
8.7	How do I add/remove columns to one of my reports?	27
8.8	How do I see the asset allocation of my account?	27
8.9	How do I see the breakdown of my cash?	28
8.10	How do I find a document?	28
8.11	How do I manually upload a document?	28
8.12	How do I query data displayed on Evelyn Partners online?	28
8.13	Is there an app for Evelyn Partners Online?	28
8.14	Can performance data be seen on Evelyn Partners Online?	28
8.15	How do I update my personal details?	28
8.16	Why is the site not recognising the device that I have already registered?	28

1. Welcome to Evelyn Partners Online

Evelyn Partners Online is a secure portal bringing together holdings information and document management.

Evelyn Partners Online delivers the following:

- Secure access to your holdings information
- Information on the move
- Dashboard style high level summary information
- Ability to view and upload documents
- Ability to customise reports
- Email notification prompts to view newly uploaded documents

2. Accessing Evelyn Partners Online

2.1 Evelyn Partners online URL:

For quicker access to Evelyn Partners Online it is recommended that the link is added to your favourites bar.

<https://clients.evelyn.com>

2.2 Login Security

All users should be able to access their data on the portal regardless of the device used. In addition, the device is not required to be registered to gain access, although as pointed out below, this feature may be used to help speed up the login process. To access the new portal, each user must progress through **two factors of security** which are outlined below:

2.3 1st Security Factor

User enters the following:

- Login name
- Password

2.4 2nd Security Factor

The user must progress through this stage using one of the following:

- **Entry of a system generated numeric code**
 - The user can choose for this code to be distributed either by email or text. (The email address and text number that the system uses are confirmed by the user as part of the initial user enrolment)
- **System generated telephone call**
 - The user can choose to receive a system generated call, which when answered, instructs the user to select a key on their phone key pad (The telephone number that the system uses is confirmed by the user as part of the initial user enrolment)
- **System recognition of a previously registered device**
 - The "Registered device" is a profile collected by the portal which is made up of a collection of data points that can be gathered from the user's browser. This feature is intended to make it easier and quicker for the users to pass through the second factor security element, however if the users device & browser's data changes, or if the site is not able to collect sufficient data to match against a saved profile, then this feature will not work and the user will need to pass through security using one of the other second factor options.
 - There are a number of elements which will cause a mismatch after the initial device has been registered. These potential triggers are listed below:
 1. The user is in the process of traveling or has travelled and/or is using the device in a different time zone from where the device was originally registered
 2. The user is attempting to login in using a different browser (e.g. Internet explorer or Google Chrome) to one originally registered
 3. The user has not used the device for a period of 90 days and therefore the registered device profile has expired
 4. The user has installed a new browser "plug-in" since the original device registration
 5. The user has security software installed on the device which is preventing the site from gathering the required information to match against saved device profiles
 6. The network which the device is using may be preventing the site from gathering the required information to match against saved device profiles

3. Registration

3.1 Email Notification




Once you have received the registration email from online@evelyn.com the registration process can begin. Please click on the link in the email, which will take you to the registration area on Evelyn Partners Online.

Note: This link is only valid for 7 days. After this time, please contact your Investment Manager for the enrolment email to be re-sent.

3.2 Step 1: Security code delivery channel

In order to access the site an additional level of authentication is required. Please select the channel you wish for the authentication.

The options are:

-  **EMAIL ME** – a code is sent to your email address. Once received, the code should be input into the web page to proceed to the next step of registration process.
-  **TEXT ME** – a code is sent to your mobile phone. Once received, the code should be input into the web page to proceed to the next step of registration process. *(This option will not be available if Evelyn Partners Online administration has not confirmed a text number prior to enrolment. The user will have the opportunity to confirm the text number in a later step in the registration process)*
-  **CALL ME** – no code is required to be input on the site. You will receive a call from Security Company called “Duo” who will ask you to press a key on the keypad of your phone to gain access to the next step of registration process. *(This option will not be available if Evelyn Partners Online administration has not confirmed a telephone number prior to enrolment. The user will have the opportunity to confirm the telephone number in a later step in the registration process)*

3.3 Step 2: Security details

Secure Portal

evelyn
PARTNERS

Register Step 2 of 3

Security Details

Create your User ID *

UserName

Choose a Password *

Password

Confirm Password *

Confirm Password

Continue

User ID & Password Rules

Your User ID must meet the below minimum requirements:

- Between 9-15 Letters and Numbers
- The only special characters that can be used are full stops (.)
- No spaces are allowed in the User ID
- The '@' special character is not allowed in the User ID

You can change your User ID later if you wish.

Your password must meet the below minimum requirements:

- Minimum 8 characters, maximum 12 characters
- At least one capital letter and one lower case letter
- At least one number
- At least one special character (e.g. @, #, \$)

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3.4 Create your User ID

Requirements:

- Between 9-15 letters and numbers
- The only special character that can be used is full stops (.)
- No spaces are allowed in the User ID
- Please do not input your email address, this is not permitted for security reasons - the '@' special character is not allowed in the User ID

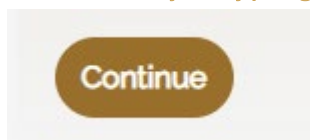
It is possible to change your User ID in personal settings once you have logged in.

3.5 Choose a password

Your password must meet the following requirements:

- Minimum 8 characters, maximum 12 characters
- At least one capital letter and one lower case letter
- At least one number
- At least one special character (e.g. @, #, !)

3.6 Confirm password by retyping it



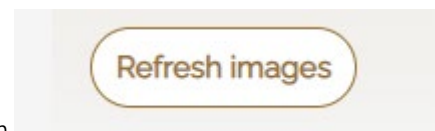
- Click on
- Your password will not expire

3.7 Step 3: Personal Assurance Message & Image

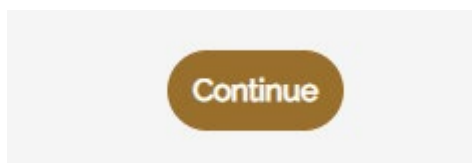
The personal assurance message and personal assurance image give you the confidence that you are logging onto the authentic Evelyn Partners Online site. The personal message and selected image automatically appear when a password prompt is requested.

Always look for your personal assurance message and personal assurance image when you log onto Evelyn Partners Online.

- Create a message personal to you: this is a free text field allowing you to type in anything you wish.



- Select an image from one of the images displayed. Click on to get a wider choice of images displayed.



- Click on

If you do not recognise the personal assurance picture and message when you log on, you may not be on the authenticated site.

Equally, you may have mistyped your User ID. Please go back to the previous page and re-type your User ID.

If you have any questions please contact your Investment Manager.

3.8 Confirmation of telephone and mobile numbers for multi authentication channels

Confirm the telephone number for the multi factor authentication channels:

1. Phone number for Text Me (mobile)
2. Phone number for Call Me

Secure Portal

evelyn PARTNERS

Telephone and mobile device confirmation

Phone Number for Text Me (mobile) + 44 GBR 2071234567

Country code and mobile telephone number

Phone Number for Call Me + 44 GBR 2071234567

Country code and telephone number

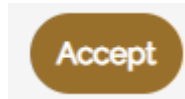
Save

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- Please update the telephone numbers if they are not correct and click on 

3.9 Evelyn Partners Terms & Conditions

Please read the Evelyn Partners Online Terms & Conditions. If you agree to the statement please click on



If you decide to reject the Terms & Conditions you will not be able to access the site. Rejecting the statement will take you out of Evelyn Partners Online and back to the page where you enter your User ID.

3.10 Receive a registration email

Once the process is complete you will receive an email from online@evelyn.com to let you know that the registration process has been successful.

If you do not receive a confirmation email, the registration process has not completed. In this instance please contact S&W Online support.

3.11 Manage My Devices

The next time you log in you will have the opportunity to register the device being used. By registering the device you will only be required to enter the first level of authentication (user ID & password) for future visits.

The "Registered device" is a profile collected by the portal which is made up of a collection of data points that can be gathered from the browser on the device. This feature is intended to make it easier for the users to pass through the 2nd factor security, however if the users device and/or browser's data changes or if the

site is not able to collect sufficient data to match against a saved profile, then this feature will not work and the user will need to pass through both the 1st and 2nd factor security elements.

For security reasons we advise you only to register personal devices and if a device is not used for a period of 90 days, the registered profile will automatically expire.

Manage My Devices

i You have opted to register this device, please enter a name below. Please note, the device profiles expire after 120 days of inactivity.

Device Name **Register**

Name	Expires	Registered Devices
------	---------	--------------------

Cancel



- Enter a device name and then click on

- If you wish to retain the second level of authentication you can choose not to register the device by



clicking on

4. Logging in

4.1 How to access Evelyn Partners Online

Evelyn Partners Online can be accessed from:

1. <https://clients.evelyn.com>
 2. Your Favourites (if you have saved it in your favourites menu)
- Enter your User ID and password

Secure Portal

evelyn
PARTNERS

Login

We have recently changed our name from Smith & Williamson to Evelyn Partners.
[Learn more about our rebrand](#)

Please enter your user ID

Enter User Id

Login

Site Support

Please only access this portal from www.evelynpartners.com

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Remember: Always look for your personal assurance message and personal assurance image when you log onto Evelyn Partners Online.

If these are incorrect, then please:

1. Check your user ID is typed correctly
2. Check the website address

If the above are correct and the assurance message and picture continue to be different please contact your Investment Manager.

Upon logging in you will be taken to the Account Overview page where your investments with Evelyn Partners will be displayed.

5. General Navigation

5.1 Layout

Evelyn Partners Online is divided into 5 different sections:

1. Overview
2. Reporting -
3. Documents
4. Account Groups
5. Account Information

5.2 Overview

When you first log onto the site you will be taken to the Overview page. All of the accounts that you have access to should be listed on the right hand side. If you have access to multiple accounts, click on the name and the Overview page will refresh with that account's data.

Each time you log onto Evelyn Partners Online the account details displayed on the Overview page will be the first account in the list.

Please note: All data displayed on Evelyn Partners Online is from the close of business on the previous working day.

The Overview page is split into 4 sections:

5.3 Account overview

Dashboard style high level account information displayed in 3 widgets:

1. Total Assets (total assets for the selected account)
2. Asset Allocation (hover over the pie chart to view the asset allocation breakdown)
3. Estimated Income (ability to toggle between a % or monetary amount)

The screenshot shows the Evelyn Partners Online interface. The header includes the logo, navigation menu (Overview, Reporting, Documents, Account Groups, Account Information), and user information (LAST UPDATED 31 MAY 2022, User Guide, Disclaimer, John User, Logout). The main content area is titled 'Account overview' and features three widgets: 'Total Assets' (£1M), 'Asset Allocation' (pie chart), and 'Estimated Income' (£1.1K). A search bar on the right lists available accounts. Callouts highlight: 'Header containing the main navigation points across the site', 'Account Overview dashboard style data', 'Ability to type in the name or account code', 'Available accounts', and 'Data and information displayed for the specified account'.

5.3.1 Summary

Consists of 2 summary reports:

1. Asset Allocation: holdings displayed by region and asset class
2. Cash Balances: bank account balances displayed in local currency

Summary level information

Summary		Asset Allocation Cash Balances		
Account Name	Account Reference	Currency	Balance	Interest Rate
Demo User GBP Investment Account	MACC_51829166	GBP	926,651.20	0.3%
Demo User GBP Stock and Shares ISA Account	MACC_51829180	GBP	20,000.00	0.3%

5.3.2 Detailed reports

Consists of 3 detailed reports

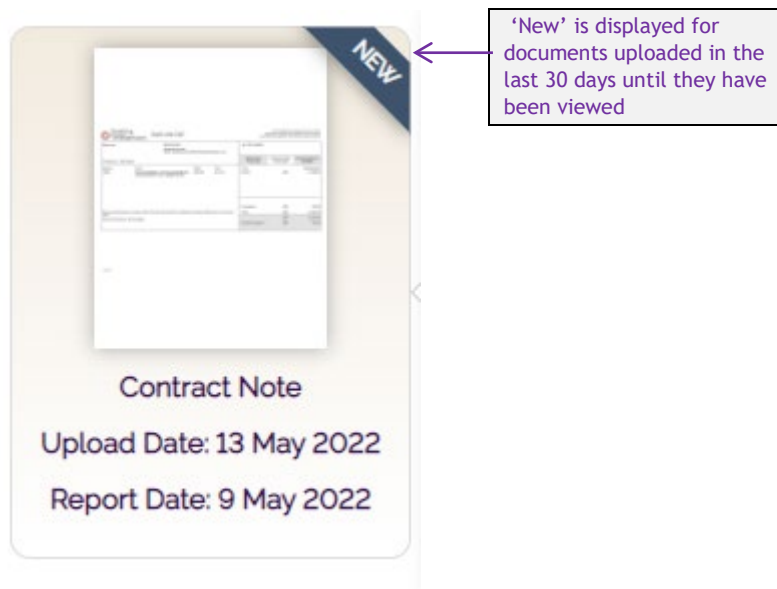
1. Portfolio: displays holdings on the selected account (similar to that shown in your valuation)
2. Portfolio Transactions: displays portfolio transactions over the previous 6 months (similar to that shown in your valuation)
3. Cash Transactions: displays cash transactions over the previous 6 months, broken down by bank account (similar to that shown in your cash statement)

5.3.3 Recent Documents

This gives you quick access to documents recently uploaded onto Evelyn Partners Online. Note: All documents can be viewed in the main documents section (see section 5.4)

The last 16 documents uploaded will be displayed in 'Recent documents'.

If a document has been uploaded for you on Evelyn Partners Online, you will receive an email notification to let you know.



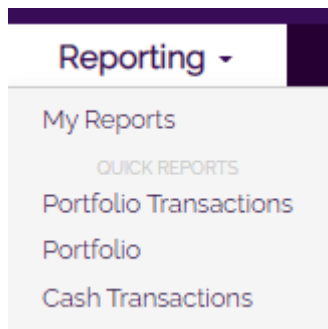
5.4 Reporting

The Reporting tab offers additional functionality to the reports displayed on the Overview page:

1. Add/remove columns to existing reports
2. Ability to sort columns: click on the column header
3. Amend the date range of a report
4. Ability to save adjusted (add/remove columns) reports
5. Download reports to Excel

5.5 Add/remove columns to existing reports

- From the Reporting tab drop down menu select one of the detailed reports



- After selecting the report click on



- The 'Column configuration' window will open showing all of the potential columns for display. To add columns drag over the columns from 'Available columns' to 'Active columns'.
- It is possible to reorder the columns by dragging them up and down 'Active columns'.
- Do not select more than the maximum number of active columns permitted in the report.

Column configuration

Click to move columns between lists. Drag and drop to re-order the columns as you want to appear in the report.

Available columns

Search available columns

- Classification Level 1
- Classification Level 2
- Classification Level 3
- Exchange Rates

Active columns (Max 12) 10 of 12

Search active columns

- Trade Date
- ISA
- Trade Type
- Security Name

Cancel Apply changes

Apply changes

- Click on

5.6 Sort columns

- Click in the header for the column you wish to sort by.
- E.g. To sort by Security Name - click on the column header and the report sorts by security name

Trade Date	ISA	Trade Type	Security Name	Quantity	Dealing Price	Charges	Accrued Income	Consideration	Book Cost Change	Exchange Rates	ISIN
------------	-----	------------	---------------	----------	---------------	---------	----------------	---------------	------------------	----------------	------

5.6.1 Amend the date range of a report

- The transaction reports are run with a default date range of 6 months.
- With a rolling history of 2 years, it's possible to go back up to 2 years.

Click on **Filters**

Portfolio Transactions

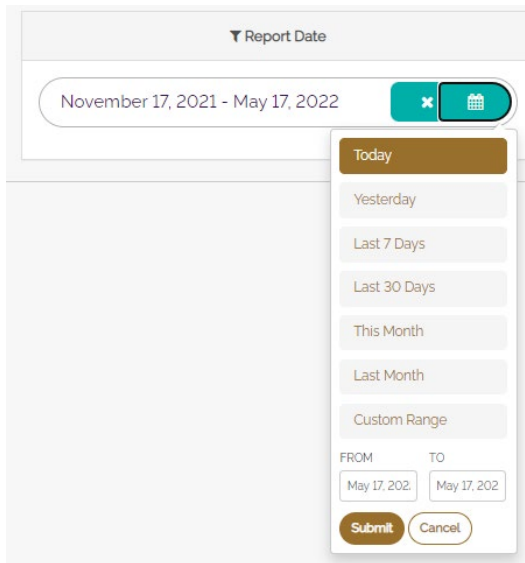
Trade Date	ISA	Trade Type	Security Name	Quantity	Dealing Price	Charges	Accrued Income	Consideration	Book Cost Change	Exchange Rates	ISIN
09 May 22		Buy	APPLE INC COM USD0.00001 (US0378331005)	200	USD 157.360000	21401	-	-25,445.50	25,445.50	0.80	US0378331005
09 May 22		Buy	VANGUARD FUNDS PLC S&P 500 UCITS ETF USD DIS (IE00B3XXRP09)	100	GBP 64.330000	43.22	-	-6,476.22	6,476.22	1.00	IE00B3XXRP09
09 May 22		Subscription	BAILLIE GIFFORD & CO BAILLIE GIFFORD GBL INCOME GROWTH B ACC (GB0005772479)	2,000	GBP 20.590000	24708	-	-41,427.08	41,427.08	1.00	GB0005772479

Filters

Available Filters

Report Date: November 17, 2021 - May 17, 2022

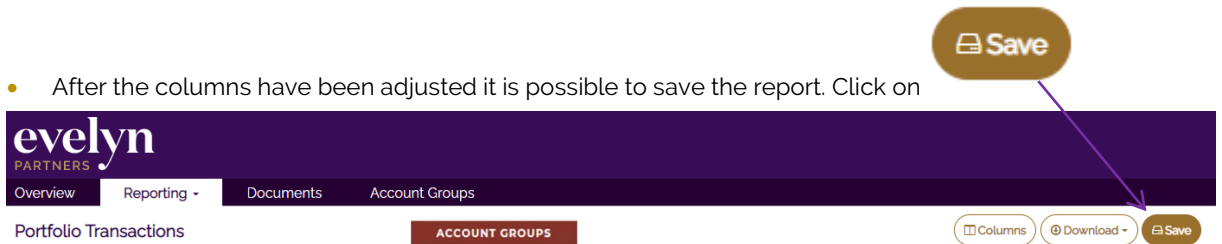
- Click on the calendar to select the date range
- Select the required range



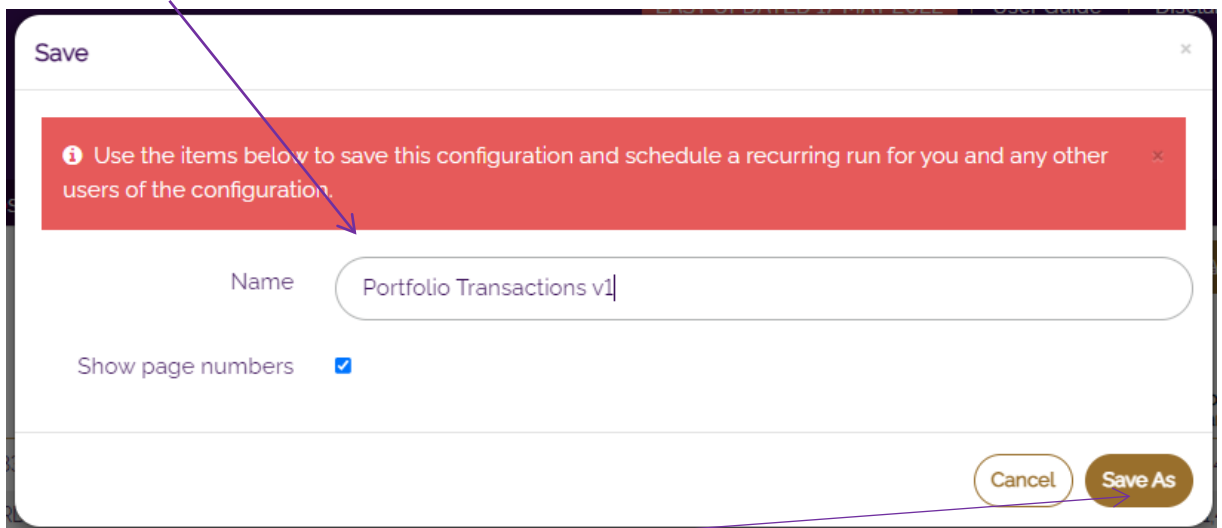
- Click on Submit

5.6.2 Save adjusted reports

- After the columns have been adjusted it is possible to save the report. Click on

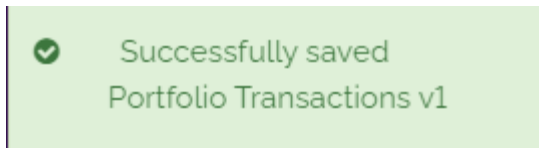


- Enter a name for the report

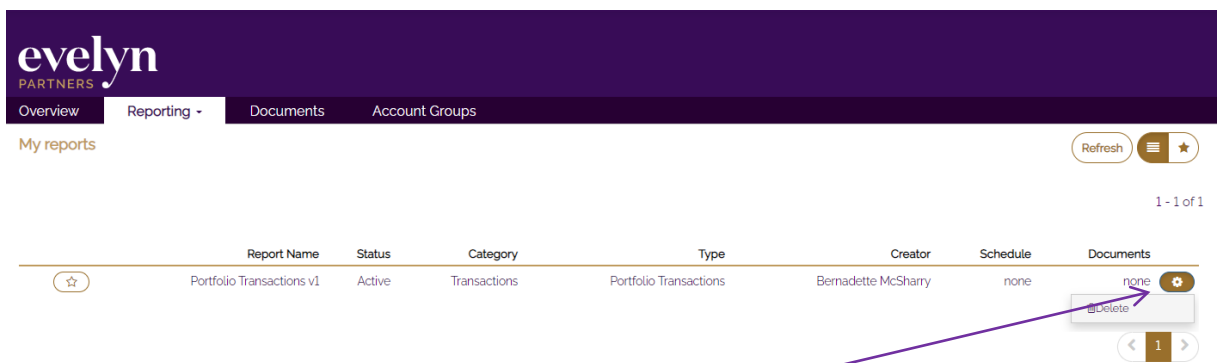
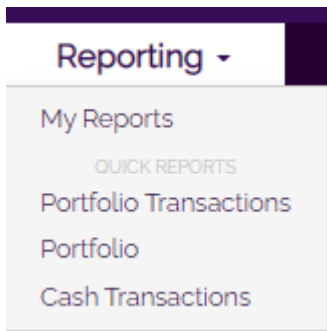


- Click on

- The following message appears



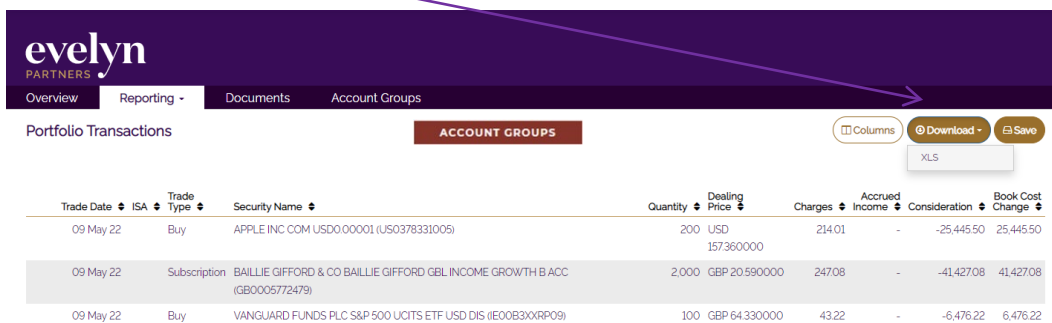
- To access the adjusted report, click on the Reporting tab and select 'My Reports' where you can view all of your saved reports.

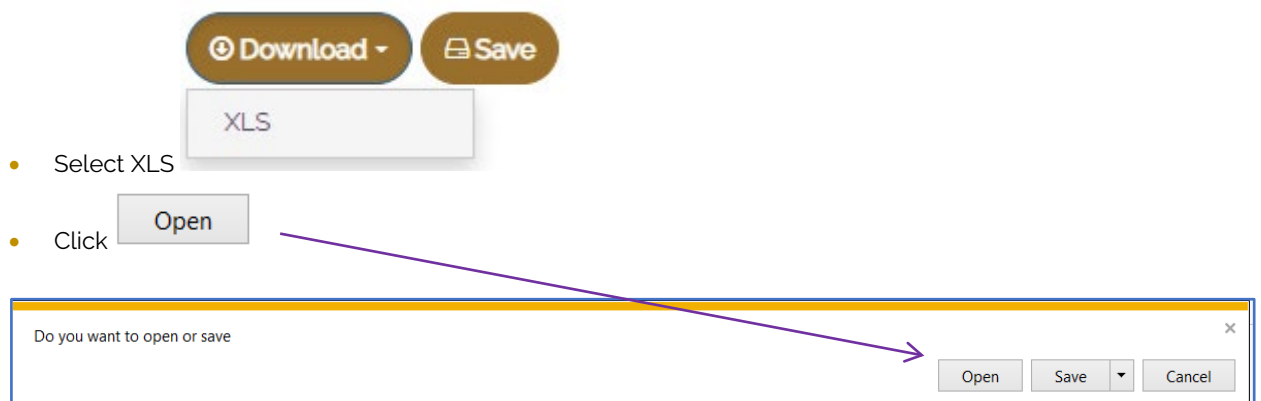


- To remove a report click on the cog and select Delete.

5.6.3 Download reports to Excel

- Click on 





- Select XLS

- Click

- The report can be viewed in Excel.

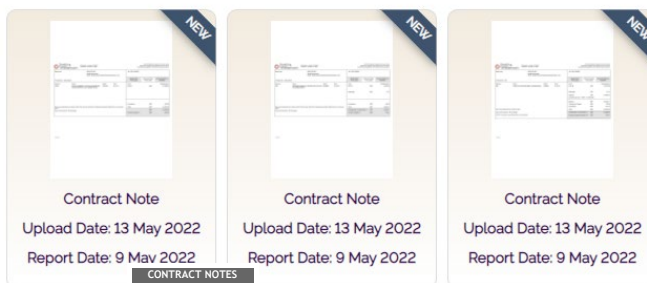
5.7 Documents

It is possible to view a range of Evelyn Partners documents on the site (e.g. contract notes).

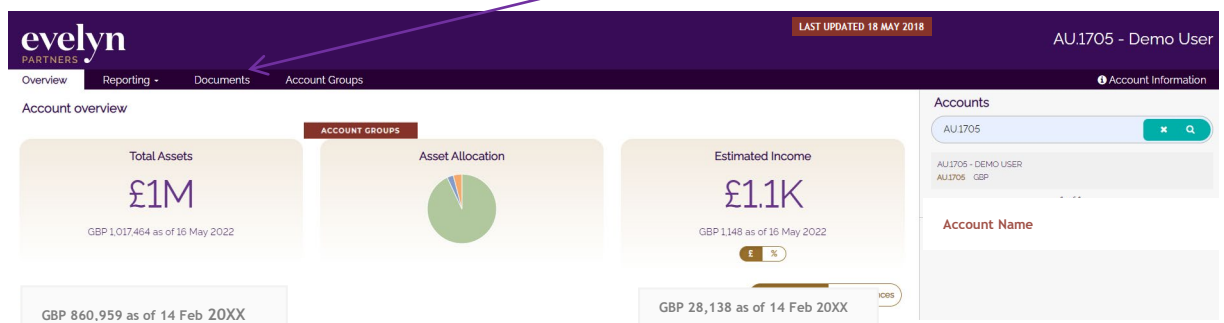
Documents can be viewed in 2 places:

1. **Recent Documents** at the bottom of the Overview page displays the 16 most documents that have been uploaded. Where a document has 'new' in the corner indicates that a document has been uploaded in the last 30 days and has not yet been downloaded.

Recent Documents



2. In the Overview page click on the Documents section

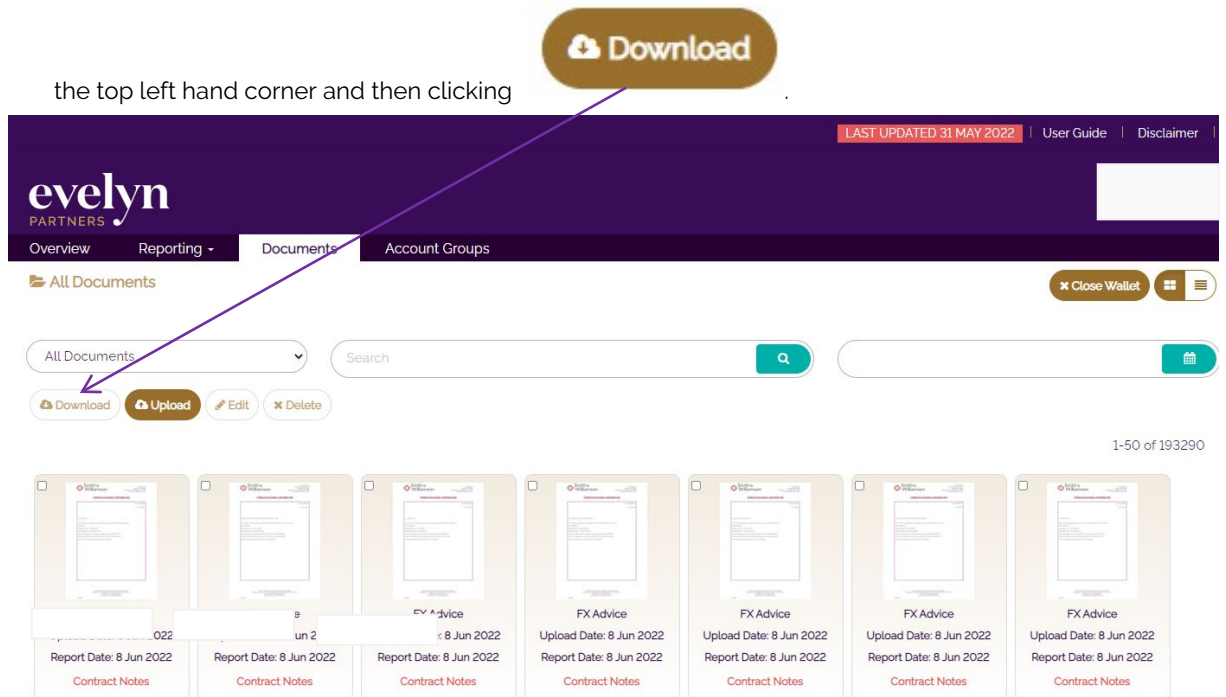


The following functionality is offered for documents:

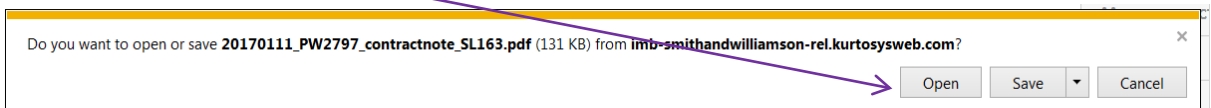
1. View/download documents
2. Search for documents
3. Ability to filter the documents into a saved search - wallet
4. Create your own wallet (saved search)
5. Upload a document
6. Email notifications: one per day regardless of the number of documents uploaded (for users with specified access).

5.7.1 View/download documents

- Select the document you wish to view either by double clicking the document or by checking the box in

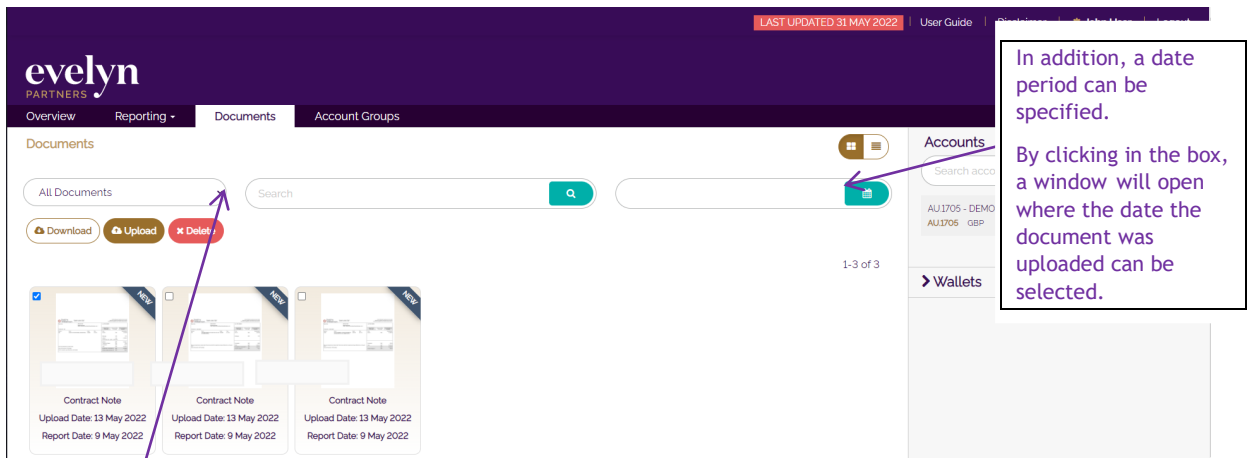


- Click on **Open**
- Document opens.

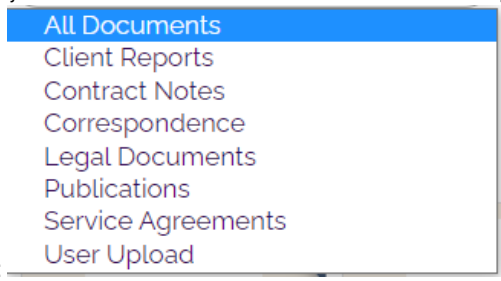


5.7.2 Search for documents

- Type a key word in the search box and click enter.



- If the document category is known this can be selected from the drop-down menu. The list of document



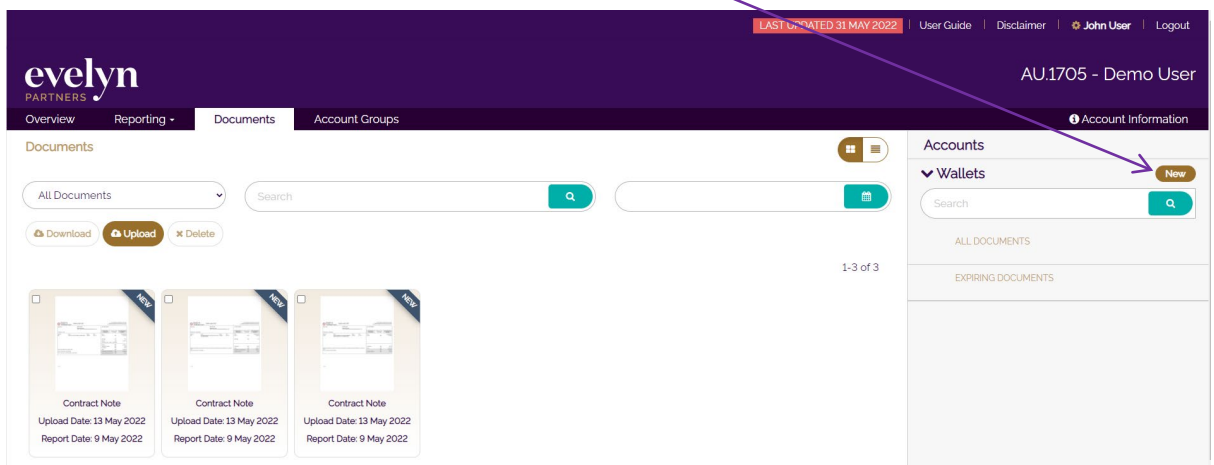
categories is as follows:

5.7.3 Ability to filter the documents into a saved search - wallet

It is possible to have a saved search that allows you to quickly look for a specific document based on the document category.

5.7.4 Create your own wallet

- In the Wallets section click on **New**
- Complete the fields in the pop-up window



The screenshot shows a 'Create new wallet' form with the following fields and callouts:

- Wallet Name:** A text input field. Callout: "Enter a name for the wallet".
- Account:** A dropdown menu. Callout: "Select the account(s) you have access to from the drop down which will be included in the wallet".
- Document Category:** A dropdown menu. Callout: "Select a Document Category from the drop down - multiple categories may be selected".
- Document Type:** A dropdown menu.
- Expires in 30 days:** A checkbox.
- Buttons:** 'Close' and 'Save' buttons at the bottom right.

The Document Type will automatically populate based on the document category selected.

- Client Reports
- Correspondence
- Legal Documents
- Publications
- Service Agreements
- Contract Notes
- User Upload



- Click

5.7.5 Uploading a document


It is also possible to securely upload documents for your Investment Manager to view.

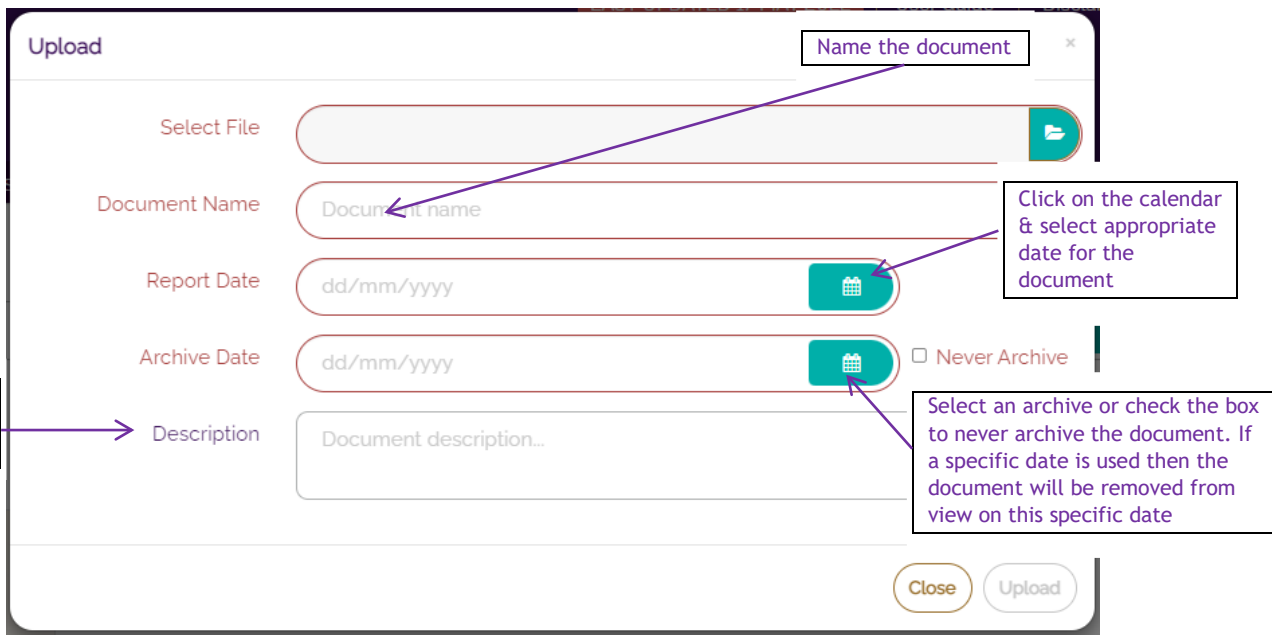
Documents

- From the Overview page click on



- Click on
- The following box appears


- Click on  and locate the document you wish to upload (double click on the document to select it).



The screenshot shows the 'Upload' form with the following fields and callouts:

- Select File:** A file selection button with a folder icon. A callout box labeled 'Name the document' points to the text input field next to it.
- Document Name:** A text input field containing 'Document name'. A callout box points to this field with the text 'Click on the calendar & select appropriate date for the document'.
- Report Date:** A date input field with the placeholder 'dd/mm/yyyy' and a calendar icon button. A callout box points to this button with the text 'Click on the calendar & select appropriate date for the document'.
- Archive Date:** A date input field with the placeholder 'dd/mm/yyyy' and a calendar icon button. A callout box points to this button with the text 'Select an archive or check the box to never archive the document. If a specific date is used then the document will be removed from view on this specific date'. To the right of this field is a checkbox labeled 'Never Archive'.
- Description:** A text area with the placeholder 'Document description...'. A callout box points to this field with the text 'A description can be entered if desired'.
- Buttons:** 'Close' and 'Upload' buttons are located at the bottom right of the form.

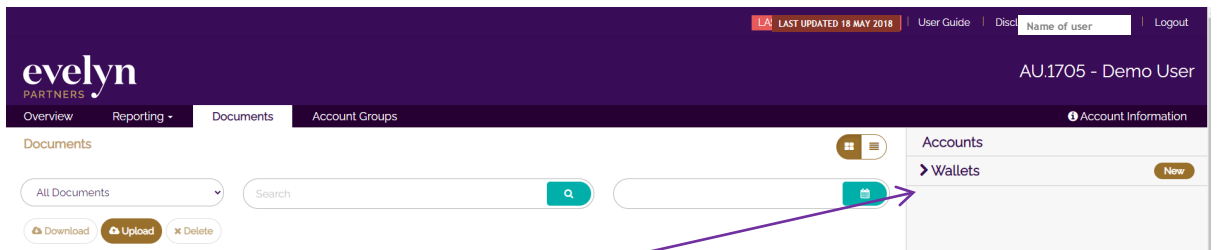


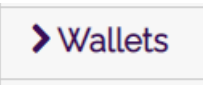
- To upload the document click on . Please note that it may take up to 30 seconds for the document to upload.

Note: If a date is entered into the archive date field, the document will set to be removed from view on the specified date.

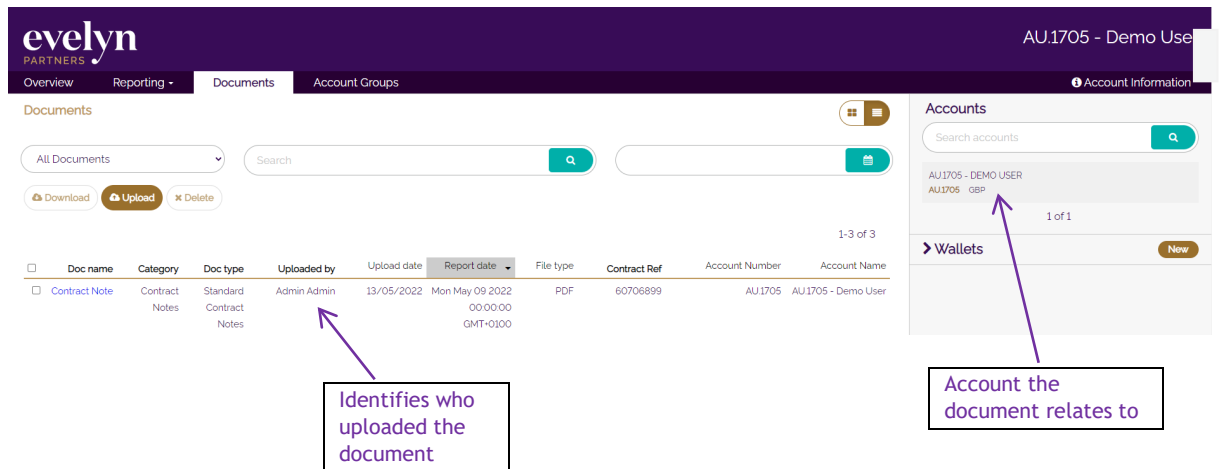
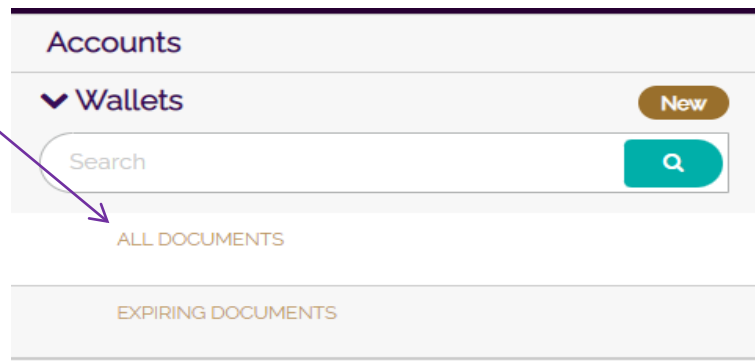
5.7.6 Email notifications

- If a document is uploaded to Evelyn Partners Online by your investment manager, you will receive an email from online@evelyn.com alerting you that a new document is available to be viewed.
- Email notifications are sent out at 07:00 GMT.
- Regardless of the number of documents uploaded, you will only ever receive one email per day.
- Each person that is authorised to receive the specific document and that has access to Evelyn Partners Online will also receive an email notification alerting them that a document has been uploaded for them to view.
- If you hold multiple accounts and a document has been uploaded, it is possible to see which account the document relates to by clicking on the '**All documents**' wallet.



- Click on 

- Click on 



Identifies who uploaded the document

Account the document relates to

5.8 Account Groups


Account Groups

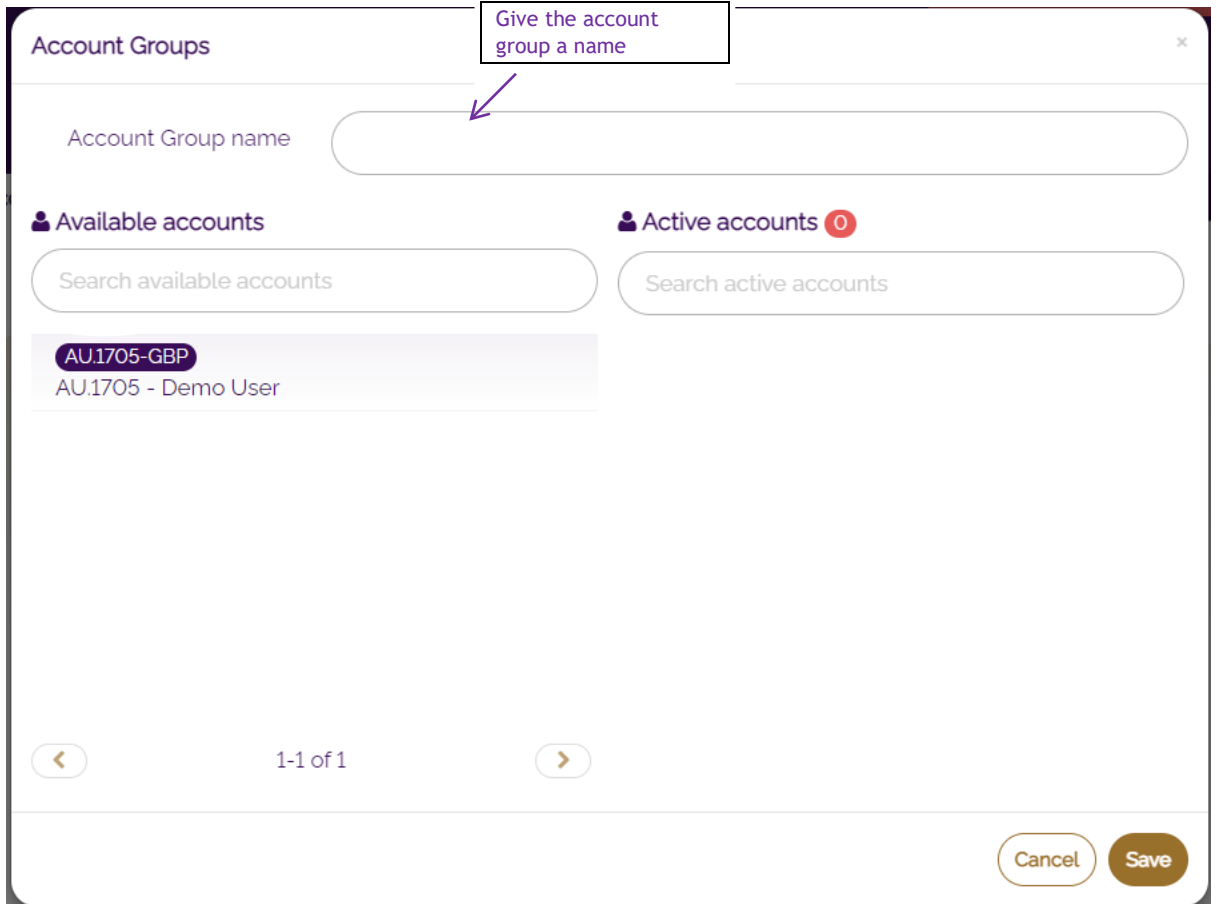
This area allows you to create and view consolidated holdings information from the list of accounts available in the overview page.

If your portfolio is managed in conjunction with other portfolios as part of a single investment mandate, a default group will be available to view in this area.

There is no limit to the number of groups that you can create.

5.8.1 Create your own account groupings

- Click on 
- The 'Account group configuration' window will open showing all of the accounts to be grouped. To add accounts, click or drag over the accounts from 'Available accounts' to 'Active accounts'.
- **You are only able to group accounts with the same valuation currency**

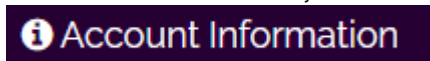


- Click 'save' to create the group and the group will appear in the list on the right hand side of the screen

- Used the   to edit or delete groups

5.9 Account Information

- To view information about your account from the Overview page click on



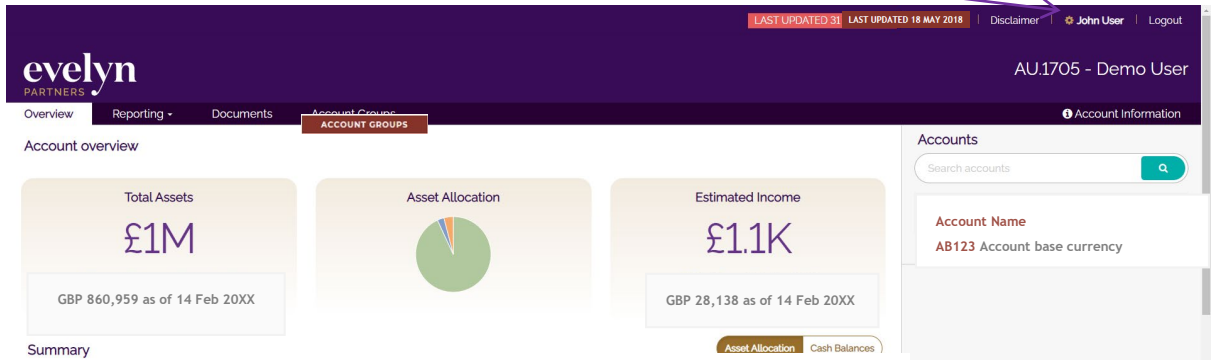
The screenshot shows the Evelyn Partners web interface. At the top, there is a navigation bar with the Evelyn logo, a "LAST UPDATE" indicator, a user profile "AU1705 - Demo User", and a "Logout" button. Below the navigation bar, there are tabs for "Overview", "Reporting", "Documents", and "ACCOUNT GROUPS". The main content area is titled "Account overview" and features three summary cards: "Total Assets" (£1M, GBP 860,959 as of 14 Feb 20XX), "Asset Allocation" (a pie chart), and "Estimated Income" (£1.1K, GBP 28,138 as of 14 Feb 20XX). A "Summary" button is located below the first card. On the right side, there is a sidebar with a search bar and a list of accounts, including "AU1705 - DEMO USER" and "AU1706 GBP".

This displays information on the following:

- Exchange Rates:** if applicable to the account
- Investment Mandate:** mandate details of the account (only specified individuals can view this depending on the level of authority allocated to the user)
- Financial Circumstances:** financial circumstances related to the account (only specified individuals can view this depending on the level of authority allocated to the user)
- Account Details:** contact details of the account owner(s) (only specified individuals can view this depending on the level of authority allocated to the user)

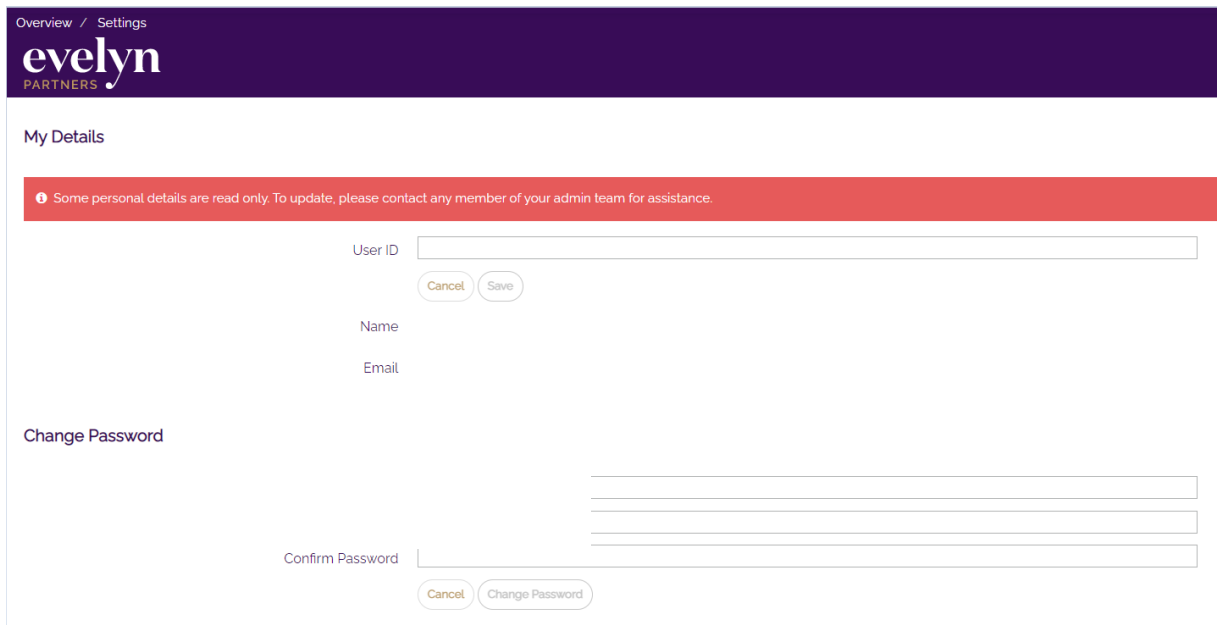
6. Personal Settings

- Click on your name in the toolbar to bring up your personal settings



6.1 My Details

- 'My Details' displays your Evelyn Partners Online User ID, Name and Email address.



- It is possible to change your User ID. Click in the User ID cell and type in the new User ID and Click on

Save

6.2 Change Password

Change Password

- If you wish to change your password, follow the instructions and click on

6.3 Phone, email, and device information

- If you wish to amend the details held for the Multi Factor Authentication channels, then please enter them in the fields provided.

Phone, email, and device information

i Your email address will be used for notifications, your phone number information will be used to validate your identity, and your trusted devices can be viewed here.

Phone Number for Text Me (Mobile)
Country code and telephone number
This is not a valid telephone number

Phone Number for Call Me
Country code and telephone number
This is not a valid telephone number

Email Address
Email does not appear to be in the correct format. Please confirm.

-
- If you decide to register the devices that you log in from, then it can be managed from this section, click on **Manage My Devices**

- To edit (rename) the device click on



Manage My Devices

Name	Expires	Registered Devices
TEST	14 Sep 2022	<input type="button" value="Edit"/> <input type="button" value="Remove"/>

- To Remove a device click on



- To come out of the window click on



- To return back to the Overview page in the tool bar click on

Overview

Overview / Settings

evelyn
PARTNERS

My Details

i Some personal details are read only. To update, please contact any member of your admin team for assistance.

7. Contact us

Please contact Investment Manager for the following:

- Bespoke mailing preferences across multiple accounts
- Forgotten User ID
- Change in contact details
- Change in financial circumstances/investment mandate
- Questions on holdings/data queries
- Questions on product features of Evelyn Partners Online

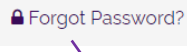
Or any other questions you may have in relation to your Evelyn Partners account(s).

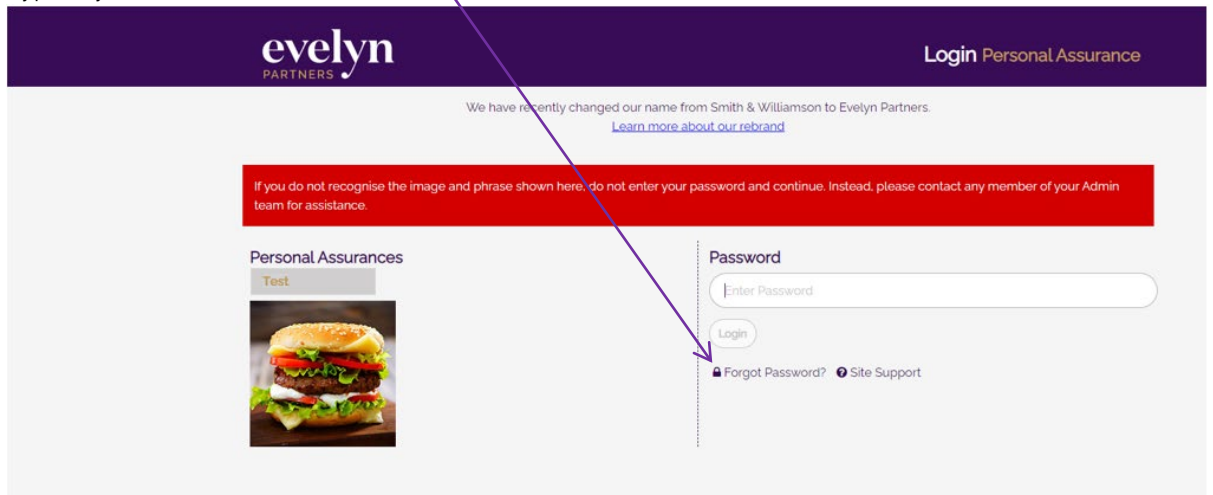
8. Frequently asked questions

8.1 Who do I contact for help?

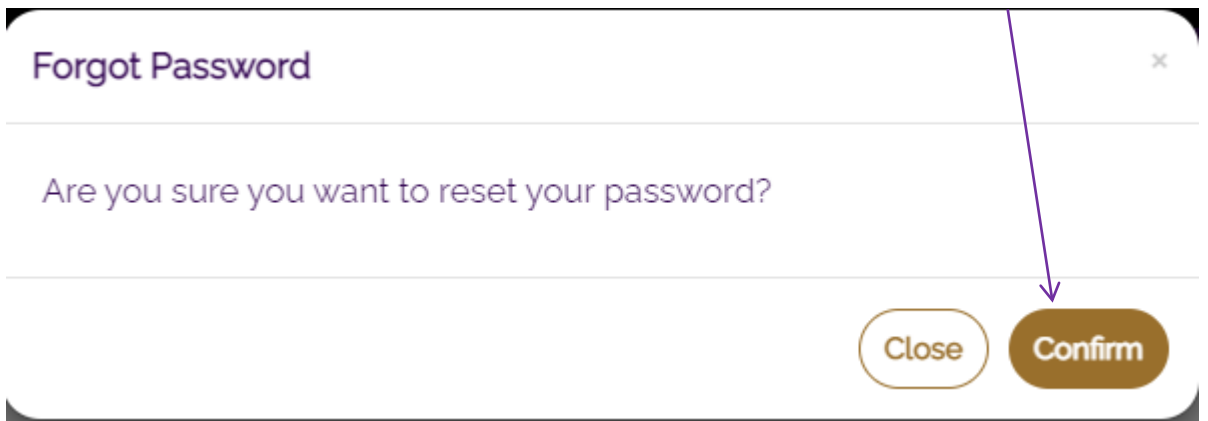
Please contact your Investment Manager.

8.2 What do I do if I forget my password?

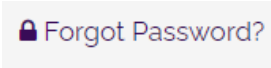
- Type in your User ID and click on 



- A window will open requesting confirmation of a password reset and then click on 



- You will then receive an email from online@evelyn.com requesting a password reset. Please click on the link in the email and follow the instructions.

- You have one hour to reset your password, thereafter please click on  again to receive an updated email and link.

8.3 What do I do if I forget my User ID?

Please contact your Investment Manager who will be able to assist you.

8.4 What do I do if I do not recognise my personal assurance picture and message?

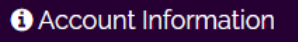
Please click on the link below:

[Check your user ID is typed correctly](#)

Always look for your personal assurance message and personal assurance image when you log onto Evelyn Partners Online.

8.5 How up to date is the information displayed on Evelyn Partners Online?

The data displayed is your closing positions from the previous working day.

If you would like to update the information displayed within  please contact your Investment Manager.

8.6 How secure is my information?

Evelyn Partners Online uses 2 factor authentication. The first factor is a password and the second factor of authentication is the user receiving a call or entering a code into the portal depending on the method of communication selected.

The first time a user logs on they will be required to go through the second factor authentication. This is required per device and if you change region when you log on. Risk based authentication (or passive finger printing) builds up a footprint of the user looking at the IP address, browser details and region. If someone logs on claiming to be you but does not fit your unique profile, you will be required to complete the second factor authentication.

In addition, on registration you are requested to select an assurance picture and an assurance message. These will be displayed every time you log on. This is to give you the confidence that you are logging onto the correct site.

Evelyn Partners will never ask you for your password or user ID.

We are committed to protecting your information, if you have any questions then please do not hesitate to contact us.

No action can be taken on an account (money transferred etc.).

8.7 How do I add/remove columns to one of my reports?

This can be done in 2 places:

1. Overview page (detailed reports)
2. Reporting tab

Please click on the link below for more information:

[Add/remove columns to existing reports](#)

8.8 How do I see the asset allocation of my account?

A high level breakdown of the allocation of your assets can be seen in the dashboard section on the Overview page. More details can be seen by hovering over the pie chart. Please click on the link below:

[Asset Allocation \(hover over the pie chart to view the asset allocation breakdown\)](#)

More detailed information on holdings can be seen in the Asset Allocation summary report. Please click on the link below:

[Asset Allocation: holdings displayed by region and asset class](#)

8.9 How do I see the breakdown of my cash?

Balances for your cash accounts can be seen on the Cash Balances summary report. All accounts are displayed in local currency. Please click on the link below:

[Cash Balances: bank account balances displayed in local currency](#)

8.10 How do I find a document?

Please click on the link below:

[Search for documents](#)

8.11 How do I manually upload a document?

Please click on the link below:

[Uploading a document](#)

8.12 How do I query data displayed on Evelyn Partners online?

To query any data displayed on Evelyn Partners Online please contact your Investment Manager.

8.13 Is there an app for Evelyn Partners Online?

There is not currently an app, but Evelyn Partners Online has been designed to dynamically render when viewed from a mobile phone or tablet (via the web address).

8.14 Can performance data be seen on Evelyn Partners Online?

Performance data is not currently available.

8.15 How do I update my personal details?

To update any of your personal details displayed on Evelyn Partners Online please contact your Investment Manager.

8.16 Why is the site not recognising the device that I have already registered?

There are a number of elements which will cause a mismatch after the initial device has been registered and will result in the user having to proceed through both the 1st and 2nd security factors. These potential triggers are listed below:

1. You have not used the device to login to Evelyn Partners online for a period of 90 days and therefore the registered device profile has expired
2. You are in the process of traveling or have travelled and/or using the device in a different time zone from where the device was originally registered
3. The user is attempting to login in using a different browser (e.g. Internet explorer or Google Chrome) to one originally registered
4. The user has installed a new browser "plug-in" since the original device registration
5. The user has security software installed on the device which is preventing the site from gathering the required information to match against saved device profiles
6. The network which the device is using may be preventing the site from gathering the required information to match against saved device profiles