Getting started with Client Portal and Mobile

Your financial advisor uses the award-winning Addepar platform to analyze your portfolio and provide you with a consolidated view of all your assets, giving you a more complete and meaningful picture of your finances. With the Addepar Client Portal and Mobile app, you can access a complete, up-to-date view of your investments anytime, anywhere, all at the touch of a button. In this guide, you'll find a step-by-step walkthrough of how to sign in and navigate the Addepar Client Portal and Mobile app, and some frequently asked questions to help you get started.

Client Portal

How to set up your credentials

We recommend using Google Chrome as your browser, but Mozilla Firefox, Microsoft Edge and Apple Safari are also supported.

1. You will receive an email from **no-reply@addepar.com** containing a secure link. If you haven't received this email, please contact your advisor.
2. Click on the link and follow the instructions to set your password.
3. Sign in to the Client Portal at the secure link using your email and password.

Your secure link will expire after two weeks. If you haven't activated your account by then, you will need to contact your advisor for another secure link.

How to navigate the Client Portal

- **Select a portfolio.**
  Here you'll see all portfolios that your advisor has shared with you. These might include your main portfolio, portfolios for specific entities and more.
- **See your information from different perspectives.**
  Click Views in the navigation to explore your investments. Each view offers insights into your portfolios using tables or charts
- **Select a date range.**
  This changes the range of data reflected in the view.
- **See files your advisor has uploaded, as well as the files you've uploaded.**
  If your advisor has not uploaded any files, this section will be empty.

How Client Portal works

Your Client Portal is the hub for your financial information. Your advisor gathers the data you need and delivers it in an easily accessible format.

The Portal has four main pages:

- **Overview** for a high-level overview of your portfolio’s performance
- **Views** for in-depth insights and a range of relevant views into your portfolio
- **Files** to access files and reports
- **My account** dropdown to manage login settings

Overview tab

The Overview tab offers a consolidated, high-level summary of your portfolio’s performance, focusing on the metrics that matter most. Effortlessly observe your net worth, rate of return, historic change in value and asset allocation all on a single page.

Views tab

Explore in-depth insights into your portfolio's performance, allocation and other relevant details within the Portfolio tab. You can display different aspects of your investments by choosing a view from the left dropdown menu. These views can give you insights into your portfolio's performance, asset allocation and more, ensuring you have visibility at all levels of granularity into your assets and holdings.

Files tab

In the Files tab, you can:

- Access and download all available files.
- Filter by files that have been shared with you, or by files that you have shared with your advisor.
- Filter files by the specific portfolio to which they apply.
- Search for a particular file by name.

Profile dropdown

From the Profile Dropdown you can:

- Enable or disable two-factor authentication.
- Send a password reset email to yourself.
- Sign out.

Addepar Mobile

How to sign in

You can sign in to Addepar Mobile with the credentials you use to access your Client Portal.

To sign in to the mobile app:

1. Download the Addepar mobile app from the App Store on your iOS device.
2. Tap the Addepar icon to open the app and sign in with your credentials.
3. Set up a PIN, then enable Touch ID or Face ID. The PIN will be used if Touch ID or Face ID fails.

Note: You can't create a PIN using the same number repeated (e.g., 1111) or sequential numbers (e.g., 1234 or 4321). Additionally, if you don't enter the correct code after five tries, you'll be logged out of the mobile app. If you need help signing in, please contact your advisor.

How the mobile app works

Addepar Mobile offers a convenient and portable way to see your financial information, providing the same views available in the Client Portal in a format optimized for your mobile device.

The mobile app has three main tabs:

- **Details** to review changes in a portfolio and navigate accounts
- **Files** to access files and reports
- **Settings** to configure mobile settings

Details tab

The Details tab provides the latest information on changes to your portfolio. You can see your portfolio's current value by time period by tapping the gray Date button. You can further explore the details of your portfolio by selecting a specific asset class or by navigating to underlying holdings for more granular information.

When using an iPad, the left panel displays your portfolio's underlying holdings, while the right panel provides details about your portfolio's current value, how it's grown over a specific period of time, and the asset allocation breakdown.

Files tab

The Files tab provides access to files, folders and reports shared in your Client Portal. You can view files by tapping on them to open them.

When using an iPad, the left panel lists all the reports grouped by holding account, while the right panel shows the report. You can expand a file to full screen by tapping the diagonal arrows icon located in the top left corner of the file view. You can also rotate the iPad to landscape for better viewing.

Settings tab

The Settings tab provides a list of options to customize your mobile app experience.

- Edit your Face ID & PIN settings for increased security.
- Choose to hide assets the portfolio no longer holds.
- Switch between dark and light mode.

Frequently asked questions

I don't see what I want in my Client Portal.

If you'd like your portfolio data displayed in a certain way, or if you'd like other data, please contact your advisor.

How often is my data updated?

Your data is updated as often as your linked financial institutions provide it. Some providers send updated data once a day while others provide it once a month.

How are my views sorted?

Your advisor configures the order of your views in Portal. Please contact your advisor if you'd like the sort order changed.

How secure is my information?

Information in your Client Portal is secured with industry-standard encryption technology, and financial institutions transmit your secured data through an encrypted channel. Your Client Portal's database is protected by full disk encryption, using native technologies from Amazon Web Services. From source files to data transmission, this layered encryption approach provides strong protection against unauthorized access to your data. Addepar also supports additional security controls, such as multi-factor authentication, to enable you to prevent unauthorized access to your information.

How do I set up two-factor authentication?

Enabling two-factor authentication improves account security by requiring an additional six-digit code every time you sign in to your Client Portal. You will find this code in an authenticator app you install on a mobile device.

1. Download and install an authenticator app to your mobile device. We recommend Google Authenticator.
2. Sign in to your Client Portal. Click your name on the top right corner of your screen, and select *Enable two-factor authentication*.
3. Click *Next*, enter your password, and click *Next* again.
4. Using your authenticator app, scan the QR code on the screen.
5. Enter the code the authenticator app displays.
6. Your Client Portal will generate five backup codes you can use to sign in if you don't have access to your authenticator. Write these down and store them in a safe place. Click *Next*.
7. Click *Done* and sign in.

The next time you sign in to your Client Portal, you'll need to enter the six-digit authentication code generated by your authenticator. Select *Don't* ask again on this computer if you want your Client Portal to remember your code for the next 30 days.

How do I disable two-factor

You can remove two-factor authentication anytime you wish but remember that this will remove an additional layer of security on your account. If you don't have access to your mobile device, or if you've lost your backup codes, please contact your advisor.

1. Sign in to your Client Portal.
2. Click your name on the top right corner of your screen.
3. Enter your password, and click *Disable*.
4. A confirmation message will appear in the bottom left corner of your screen confirming that two-factor authentication is disabled.

When you disable two-factor authentication, your existing account on your mobile device's authenticator app will no longer work. If you want to re-enable two-factor authentication, you will need to set up a new account on the authenticator app.

How do I reset my password?

There are two ways to reset your password:

You can reset your password by clicking *Forgot Password*? on the sign-in page.

1. Access your Client Portal by using the secure link your advisor sent you. If you have not received a secure link, please contact your advisor.
2. Click *Forgot Password*? on your Client Portal sign-in page.
3. Enter your email address and click *Submit*. You'll receive an email with instructions to reset your password. If you don't receive an email:
4. Check your spam or junk filters.
5. Add **no-reply@addepar.com** to your address book and try resetting your password again.

You can reset your password by clicking *Send* password reset email in your account menu.

1. Click your name in the top right corner of your screen.
2. Click *Send password reset email*.
3. You'll receive an email with instructions to reset your password.

   If you don't receive an email:
   - Check your spam or junk filters.
   - Add **no-reply@addepar.com** to your address book, and try resetting your password again.

Want to see more data?

Your advisor sets up your financial information in ways that are most useful to you. If you'd like to see your data organized differently, please contact your advisor.