

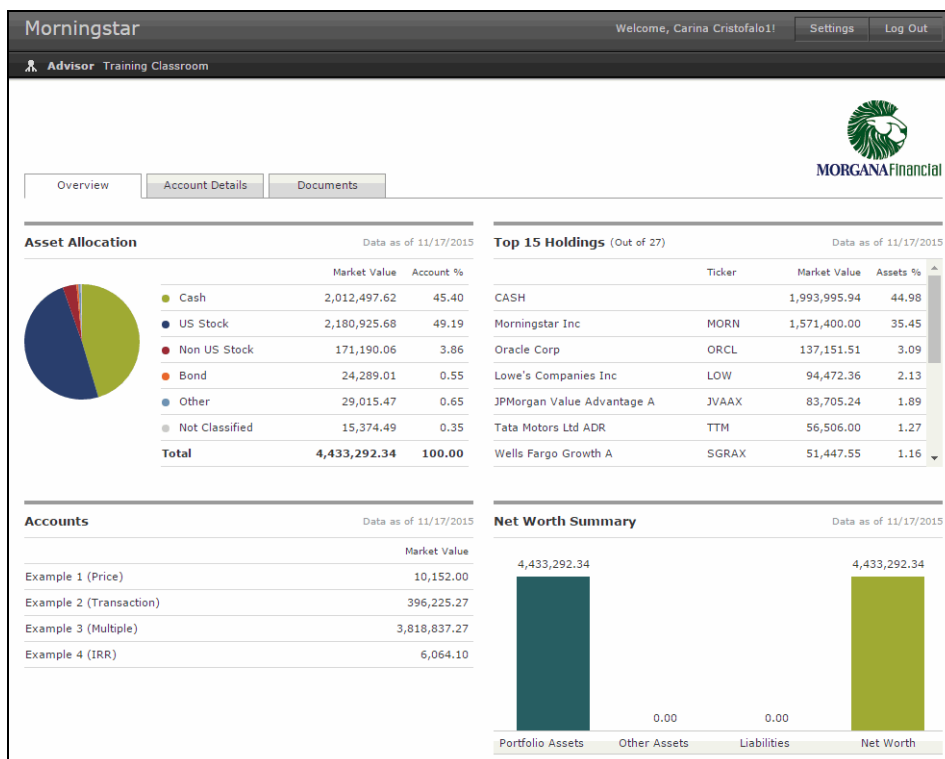
Using the Client Web Portal

As part of our ongoing commitment to you, we've enable the Client Web Portal – a secure website that you can log into using your email address and custom password.

The Client Web Portal provides real-time visibility into your portfolio and accounts, and allows for paperless access to your Performance summaries and bills. You can also upload sensitive financial information to us, securely.

In addition to being a more convenient and secure way to communicate, the Client Web Portal helps us with our initiatives to “Go Green”, eliminating the need for mass mailings and the resending of lost reports.

Overview



Now that we've enabled your client portal, you will receive an email containing the URL, as well as log on instructions. Your first email will come from **Morningstar**, from there you will receive a second email from our firm. Please follow the instructions provided within each email.

Once you log in for the first time, you can change your password to one of your own choosing.

Going forward, you will receive a notification each time we upload a document to you.

Rather than sending attachments through email, you can send and receive all of your sensitive financial documents from our secure portal. Your connection to cwp.morningstar.com is encrypted with 128 encryption.

To upload documents to the Client Web Portal, complete the following steps:

1. Launch **cwp.morningstar.com**.
2. Enter your **E-mail Address** and **Password**.
3. Scroll to the bottom half of the **Documents** tab, and click **Add File**.
4. Select your document from your hard drive, and click **Upload**.

How do I log on to the Client Web Portal?

Is the Client Web Portal Safe?

How do I upload documents using the Client Web Portal?

