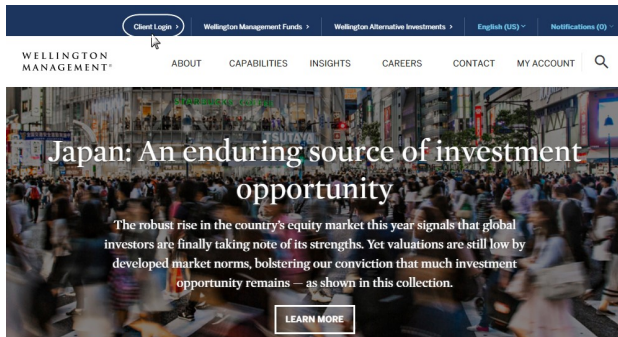


Client Portal Reference Guide

Getting Started

1. Go to www.wellington.com and select “Client Login” on upper left of the blue bar

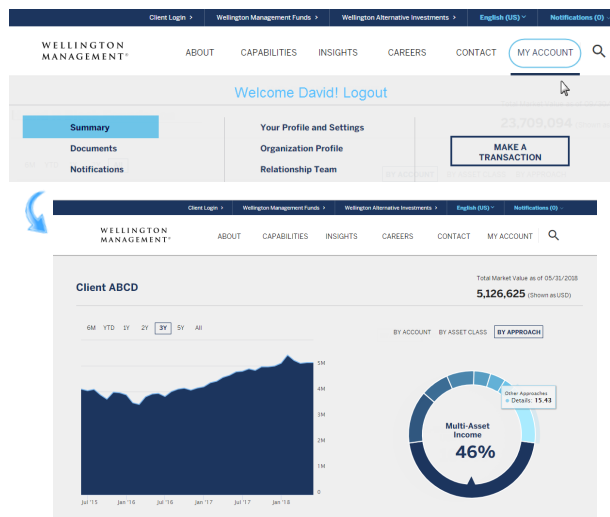


2. Enter your email address and password to login.

*Please note that if this is your first time logging in from your computer/device, you will receive an email with a verification code. Please enter the verification code to complete your login.

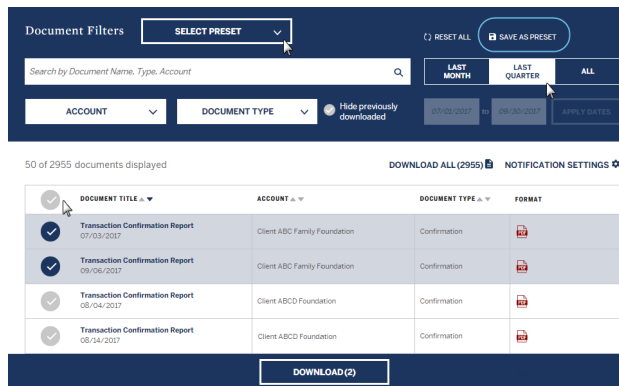
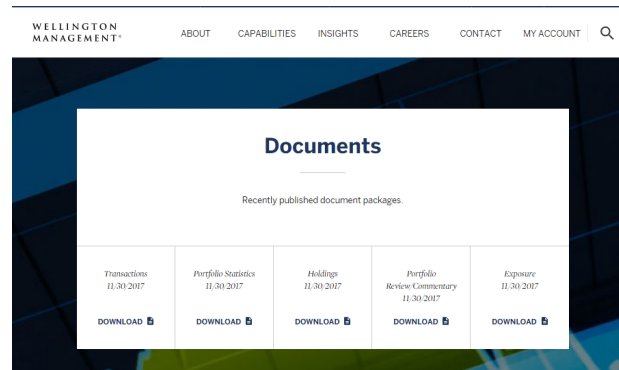
Account Information

My Account allows you to easily navigate the Client Portal website. Click the Summary page to view market value and performance information for your account(s).



Documents

To access and download documents, go to My Account and select “Documents”



Searching for Documents

Dates: To search for documents within a specific timeframe, use the quick buttons to select Last Month, Last Quarter or select All to specify a custom date range.

Presets: If you are frequently using the same search filters to locate your documents, you have the ability to save the filter as a preset by clicking Save as Preset.

Frequently Asked Questions:

How do I reset my password?

On the login screen, click **Forget Password?** and enter your email. Check your email and use the link provided to reset your password.

How can I customize investment information displayed on Client Portal?

On **My Account**, click on **Your Profile and Settings** to set preferences for the following:

- Preferred Currency for grouped or summary values
- The number of decimal places
- Date Format
- Default settings for displaying Net-of-Fee & Benchmark/Alpha

How can I set up alerts for newly available documents?

On **My Account**, click **Your Profile and Settings** and scroll down to the **Notification Settings** section. Use the toggle buttons to receive notifications and set their frequency (if applicable).

Can I add time periods to the performance tables?

The columns on the performance tables are fixed to provide a pleasant viewing experience. If you would like to see additional time periods for performance, please use the **DOWNLOAD FULL DATA** link located near the top right of the table.

How can I get information about my holdings?

On **My Account**, go to the **Documents** page to download a detailed **Holding Report** (available in Excel format and PDF).

How do I see my investment details?

Under **My Account**, go to the **Summary** page and click on the individual account to access the investment details of the following:

- Portfolio Overview
- Performance Data
- Your Activities (i.e. cash flows)
- Documents available for download

How can I make a transaction?

If you are an authorized signer, use the **Make a Transaction** button under **My Account** to submit a transaction.

When will month-end performance and market value figures be contributed?

Month-end performance and market value data is posted on Client Portal within **5 business days after month end**. Preliminary prior-day performance is always available.

Can I view my account information after it closes?

Yes, account information will be available for 12 months post closure.