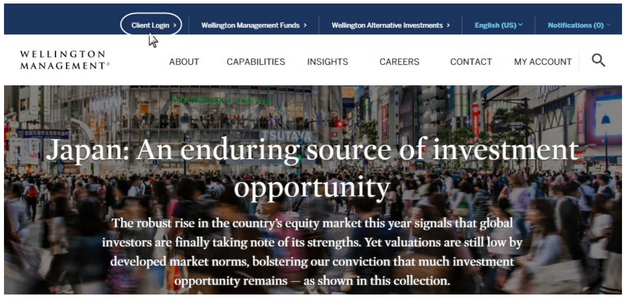
WELLINGTON
MANAGEMENT®

Client Portal Reference Guide: Consultant View

Getting Started

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



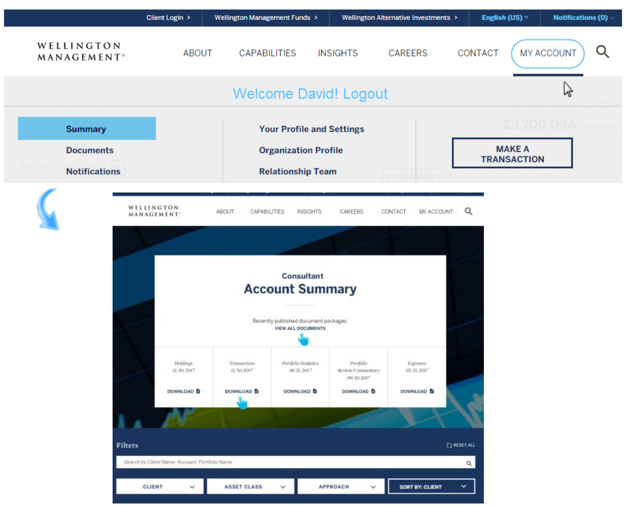
2. Enter your email address and password to login.

*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 Summary

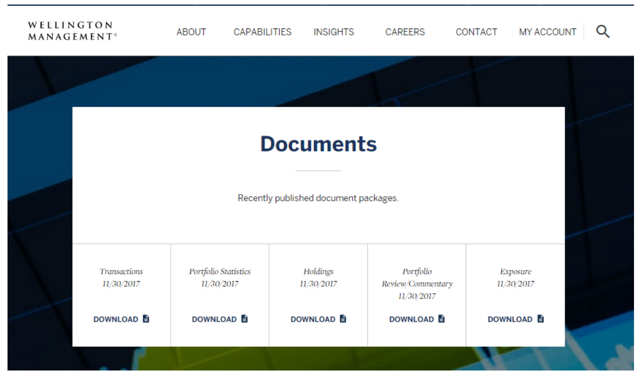
My Account allows you to easily navigate the Client Portal website. Click the **Summary** page to view market value and performance information for your clients accounts.

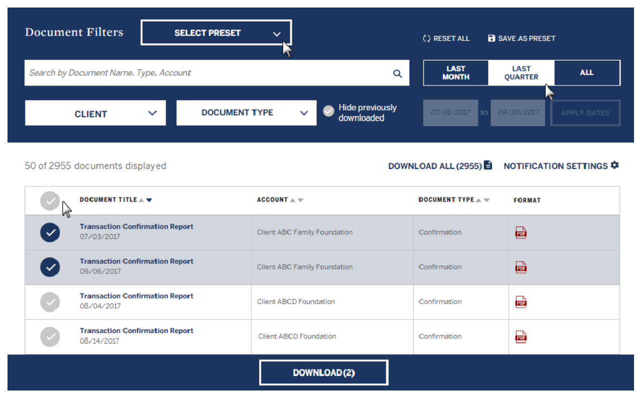
To locate specific client(s), use the search bar or filter by Client, Asset Class, and/or Approach.



Documents

To access and download your clients 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 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.