

Brewin Dolphin Client View

Quick Reference Guide

Getting started

Your username, password and a link to Client View will be sent to you via e-mail from info@brewindolphin.ie. You will be prompted to change your password the first time you log in.

How to Log In for the first time

1. Follow the link provided in the e-mail or go to ClientView.brewindolphin.ie on your browser. Links to Client View are also provided on our website.
2. Enter the username & password provided in the e-mail.
3. Please check the mobile phone number displayed on screen is correct and then select 'send code'.
4. A text message will be sent to your mobile phone with a 6 digit verification code. Please enter the code and select submit. (If you are accessing via a landline simply follow the same steps, and you will receive an automated call to your landline with the 6 digit verification code).
5. Enter a new password when prompted. Your chosen password should contain at least 10 characters, have at least one uppercase letter (A-Z), one lower case letter (a-z), and one number (1-9).
6. The Brewin Dolphin Data Consent Notice is displayed next. If you agree to the notice you will not be asked to approve this again. If you do not

agree to the Data Consent Notice you will be returned to the initial login page and will not be able to proceed.

7. On successful login, the Client View dashboard is displayed from where you will be able to view your Portfolio details.
8. Please review your list of accounts to ensure all your relevant accounts are available to view.

Subsequent Log Ins

1. Enter your username & password.
2. A text message will be sent to your mobile phone with a 6 digit verification code.
3. Enter the code on the login page.
4. Select 'login' to access your Portfolio details.

Logging out

Your session will expire after 30 minutes of inactivity. However, it is good practice to select the logout button at the top right corner of your screen and close the tab on your browser when you have finished using Client View.



Forgot my Password

- On the login screen select 'forgot password'.
- Enter your e-mail address.
- An e-mail will be sent to you with a link to the reset password screen. This link will expire after 15 minutes.
- Click on the link provided and then enter the verification code which has been sent to your mobile phone.
- Enter a new password of your choice under 'New Password'. Retype your password under 'Confirm Password' and then click submit.

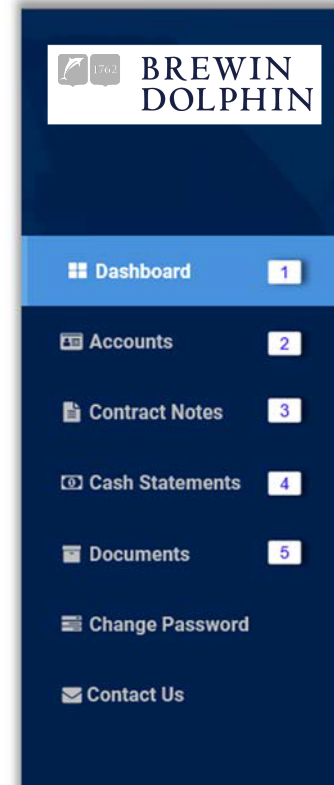
For your security

Please be aware that at times fraudulent e-mails may be circulated purporting to be from Brewin Dolphin. Brewin Dolphin never asks customers to provide their password or personal information through email.

Client View Key Features

1. Dashboard

This tab provides an overview of your Portfolio. Here you can see your total cash and the value of your assets. If you have more than one Brewin Dolphin account they will be listed under 'linked accounts'. Contract notes and other types of documentation are available to view and download. Please note that the information on the dashboard is consolidated when there is more than one account.



Dashboard: Customise the screen layout

Change size

The boxes or 'widgets' of information can be increased or decreased in size by clicking and dragging the small grey triangle at the bottom right of each widget.

Move widgets

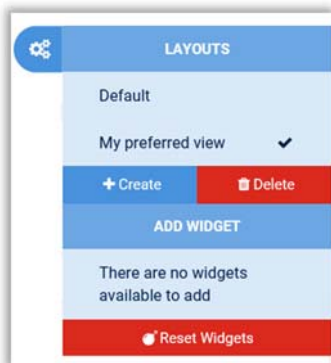
To move a widget to a new location on the screen simply place the cursor on the header of each widget and a quad arrow will appear. Hold and drag the widget to your preferred location.

Delete widgets

Select the X at the top right of each box.

Save a new screen layout

The layout symbol is at the top right side of the dashboard screen. Select '+Create' and type a name for your new layout. Deleted widgets will be retained under 'add widget' and can be added back to the layout at any time. Changes made to the layout are saved automatically and will be available at the next log in. To return to the default layout select 'reset widgets' or the 'default' layout. To hide the layouts menu select the cogs icon.



2. Accounts

The Accounts tab provides a list of your Brewin Dolphin Accounts. To view a more detailed breakdown of each account simply click on the account.

Account Details: Key features include:

- The Holdings Statement

This is a list of the assets in your Portfolio with prices updated intra-day where available. A number of options are listed at the top of this widget to help you view this information in a variety of formats to suit your needs.



- Download - generate a report in PDF or CSV format.
- Grouping - arrange by Stock, Sector & Security Type.
- Switch View - display information in either table or hybrid view (please note that table view is designed for desktops, while hybrid is designed for mobile devices).

- Columns - select columns to display or to exclude from the display. Change the order of the columns by clicking, holding and moving the quad arrow which is displayed when the cursor is placed to the left of the column name.

- Documents & Contract Notes

Documents and contract notes for the selected account are listed in order of the most recently produced files first. These documents can be viewed and downloaded.

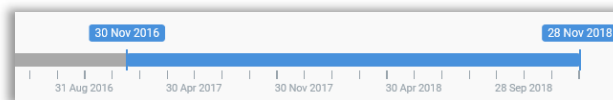
- Holdings Charts

Chart 1 displays the names of the top 10 highest value assets.

Chart 2 displays the Portfolio value by asset class for the selected account.

- Performance

The time-weighted performance for the selected account is displayed in graphical form. The date range displayed can be changed by sliding the date displayed above the graph.

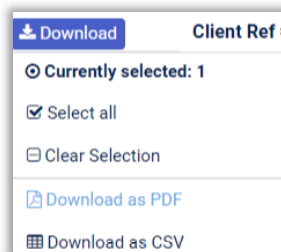


3. Contract Notes

Contract notes for trades booked after your online access has been activated will be available to view on this tab. You will receive one email at the end of the day on which new trades have been booked, containing a link to your contract notes. Please note that contract notes made available to you on Client View will no longer be sent by post.

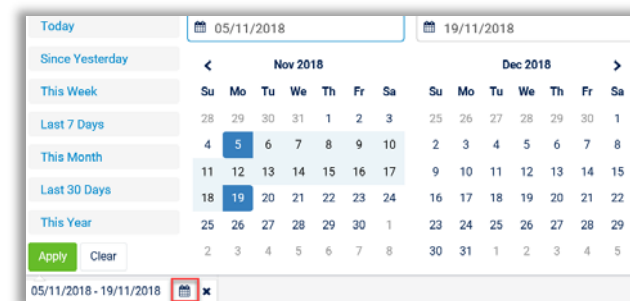
4. Cash Statements

Cash balances listed by currency can be viewed in the Cash Statements tab. To download these balances please select the tick box to the left of the account



number and then select the download button. The reports are available in PDF and CSV format and list transactions from January 1st of the previous year.

- To view further details relating to cash balances please select the account name or any column to the right of this.
- Select the calendar icon (in red below) to pick a predefined date range (e.g. this week, this month) or simply click on two dates on the calendar to select your own preferred date range.
- These reports are displayed on screen and are also available to download in PDF or CSV format.



5. Documents

A range of reports and documents will be available to view on this tab. You will receive an email to inform you when new documents relating to your Portfolio are available to download. Please note that documents made available to you on Client View will no longer be sent by post.

Need Help?

If you have any questions or require further information relating to your Portfolio or Client View please contact your Investment Manager.

Tel 01 421 0300 or

E-mail queries@brewindolphin.ie