Brewin
Dolphin

Your guide to RBCBDClientView

(User Guide for IFAs Only)

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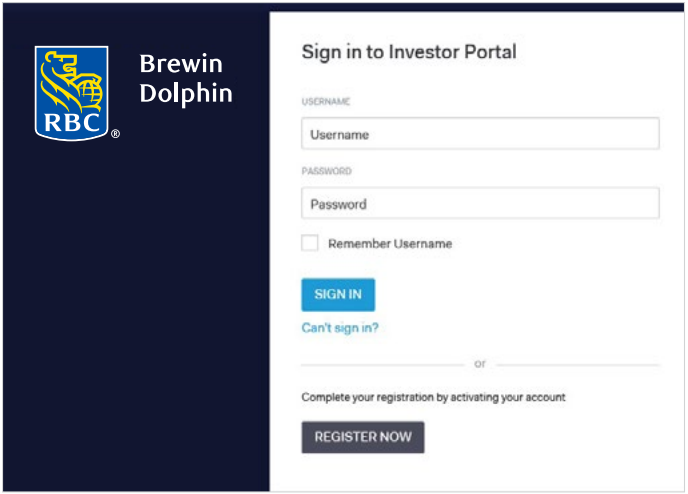
Registering for RBCBDClientView

Step 1

Type the following link into your browser address bar:
https://brewindolphinireland.pershingnexusinvestor.com

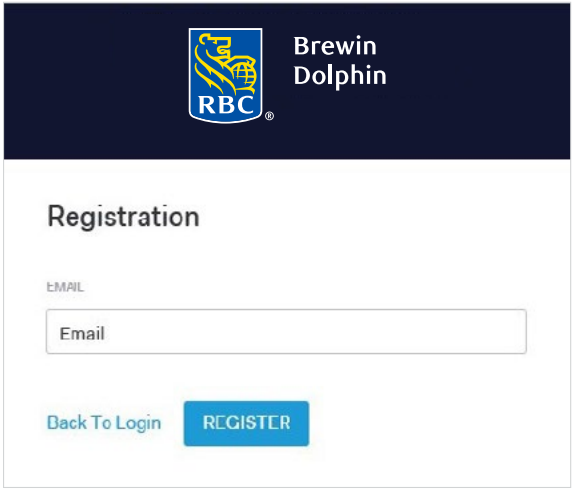
Step 2

Click on Register Now button.

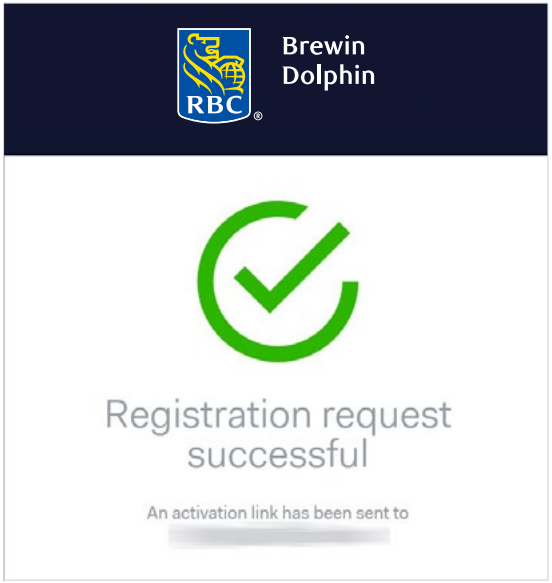


Step 3

Enter your email address then click the Register button.



If successful you will see the screen below.



Step 4

An email will be sent to you (almost immediately). It will come from brewin.ie.

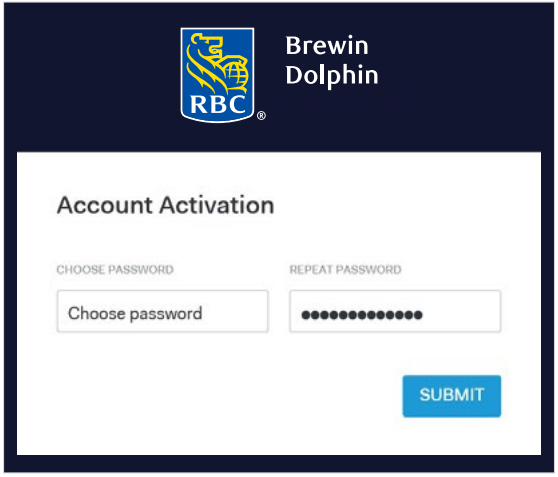
Within the email there will be a link to activate your account – click on the link. The email will also include details of your username.

This activation email will expire after 60 minutes and if it does, please re-register.

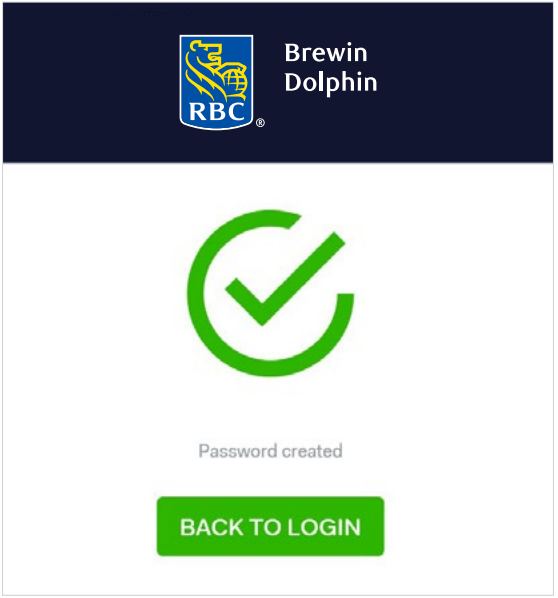
Step 5

You will then be asked to create and verify a password. Your password must include a combination of:

- At least 8 characters long (with a maximum of 15)
- One uppercase character must be used
- One lowercase character must be used
- At least one numeric character must be used
- At least one special character must be used
- (! ” # $ % & ’ * + , - . / : ; < = > ? @ [\ ] ^ _ ` { | } ~)
- It must not contain personal identifiable information



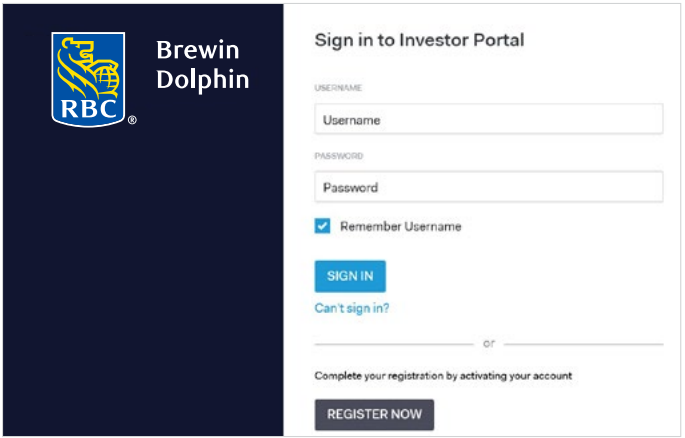
After entering your password you will see the screen below.



Step 6

If your account has been activated correctly, you will be able to sign in to the RBCBDClientView using your username and the password that you have just created.

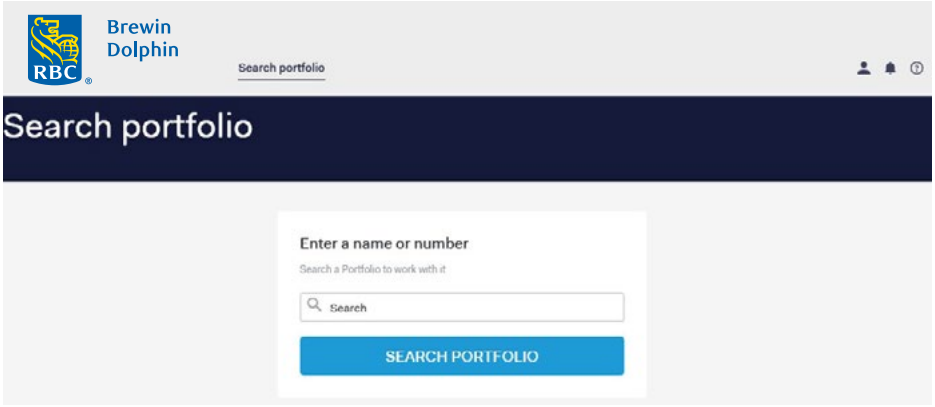
Please note: these are the details that you will need to enter each time you sign in.



Using RBCBDClientView

Search Portfolio

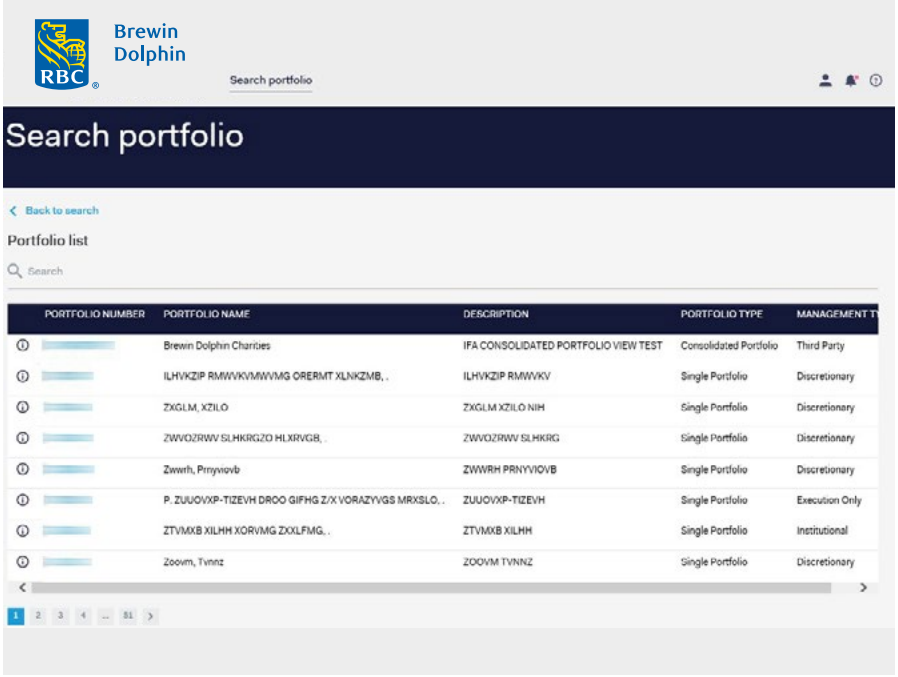
Following a successful sign in, you will be presented with the Search Portfolio screen where you can enter an existing name or portfolio number on which to search.



Using RBCBDClientView

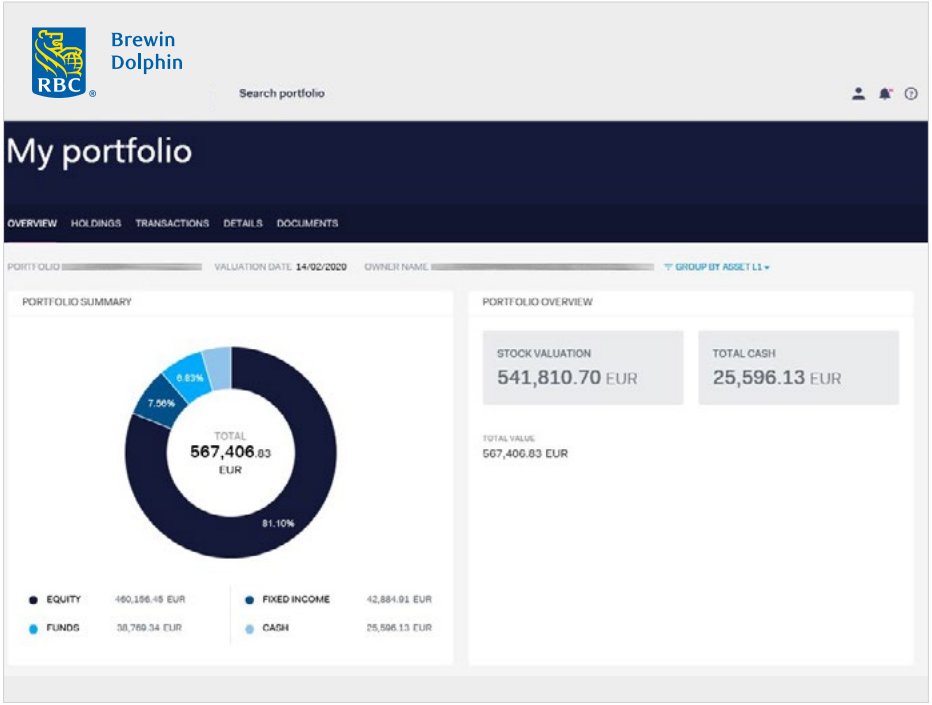
Portfolio Listing

This screen provides the results of the portfolio search.



My Portfolio

This screen provides a high level summary of the portfolio.



Click on the RBC Brewin Dolphin icon or click Search Portfolio to return Search Portfolio screen

Click on the individual tabs to navigate to:

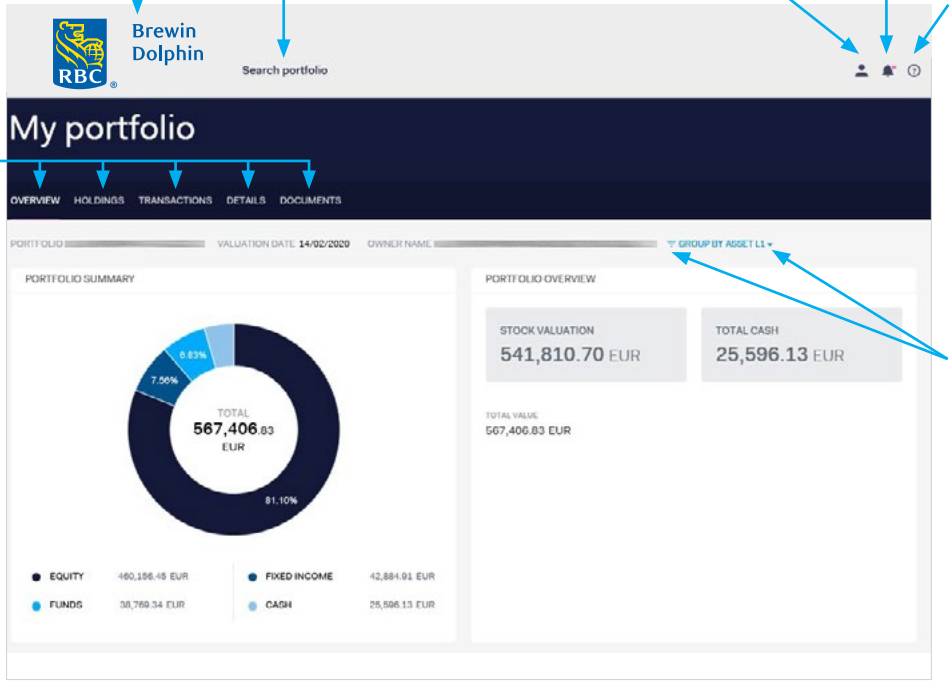
- Holdings
- Transactions
- Details
- Documents

(Note: The Document tab functionality will not be enabled i.e. documents will not be uploaded onto the portal)

Click on the Person Icon to view My Profile Settings

Click on the Alarm icon to view Notifications

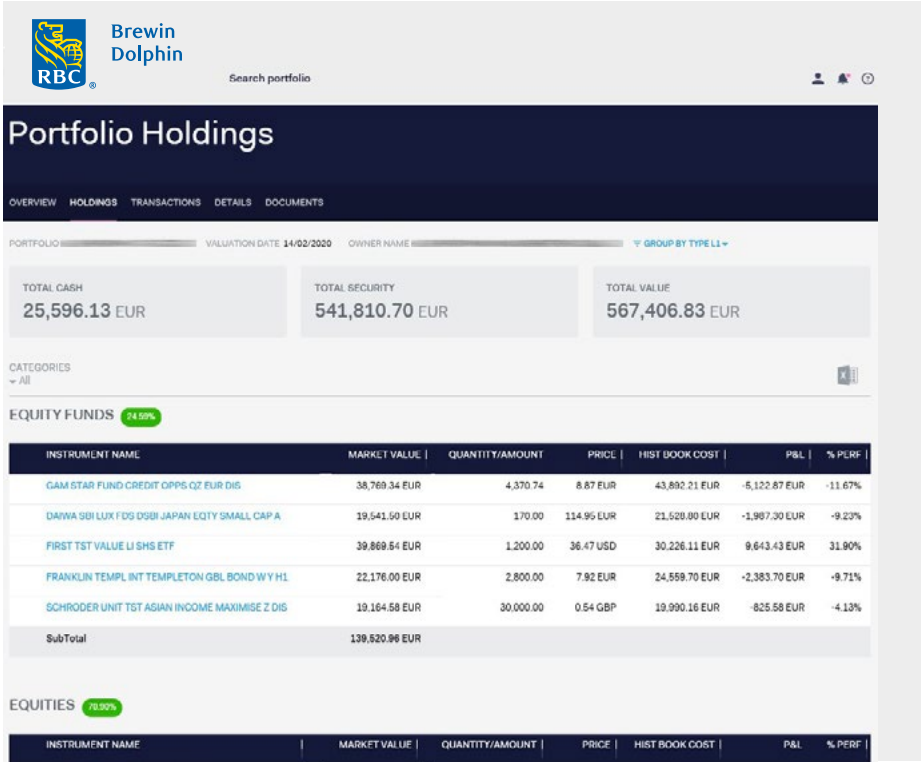
Click on Question Icon to navigate to Support



Click on the arrows to change the grouping on the pie chart to any of the other options listed.

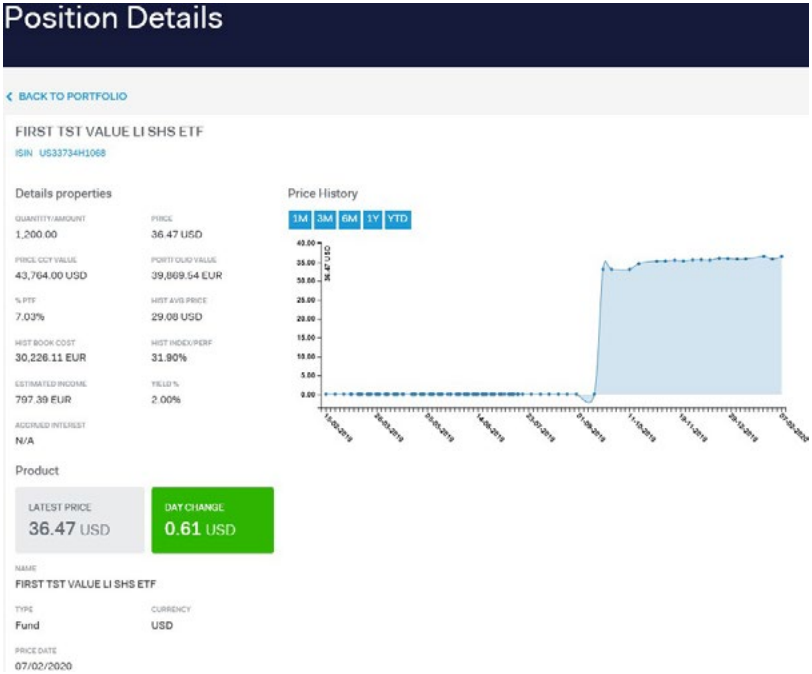
Portfolio Holdings

On this page, you will find a list of all holdings within the portfolio, with prices as at the close of business of the previous working day.



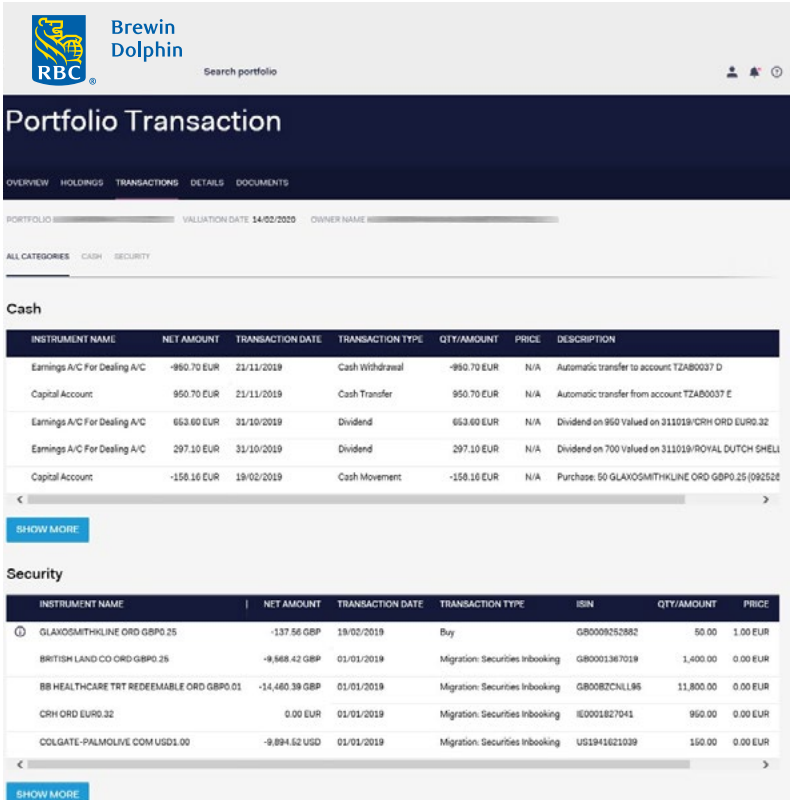
Position Details

The Position Details page, accessed by clicking on an individual holding on the Holdings page, provides further information on the stock.



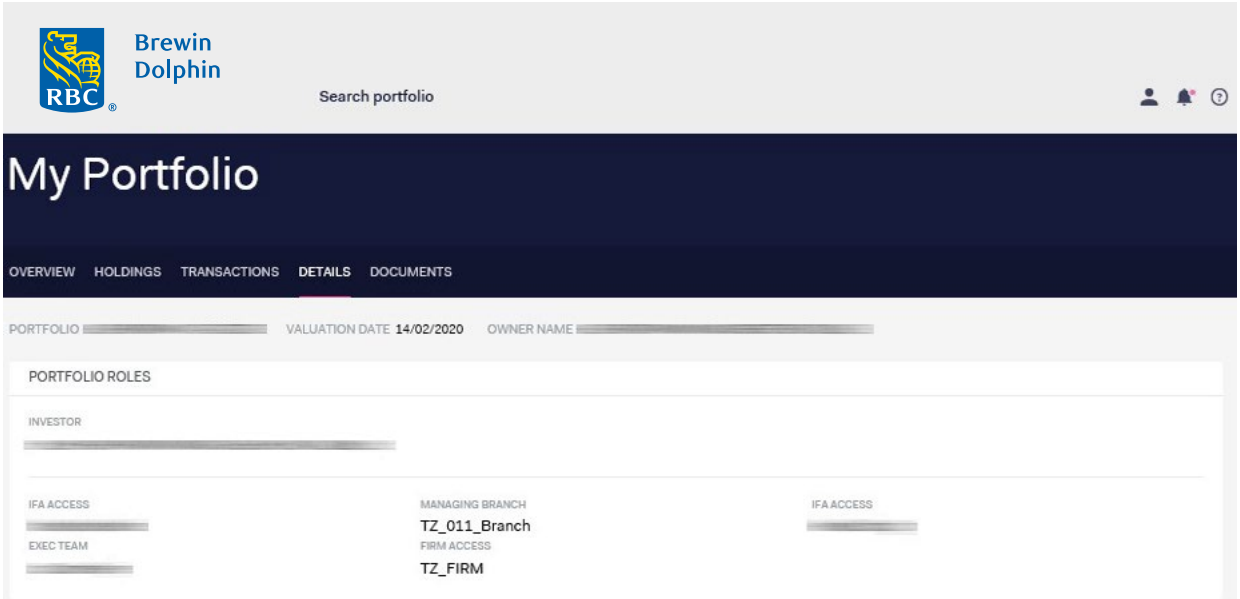
Portfolio Transactions

This page provides a list of all transactions on the account, for time period selected.



Details

This page provides details of the contact roles associated with the portfolio.



Frequently Asked Questions and System Requirements

All details can also be found within RBCBDClientView.

Who do I contact if I have any technical support issues (for example, my username/ password has been locked out or compromised)?	For portal navigation or technical support issues, including locked-out accounts contact: Digital Channels Customer Support Team Monday – Friday 08:00-18:00 and Saturday 08:00-12:00 +353 1592 1111 / BDClientView@brewin.ie
Who do I contact about my portfolio details displayed on the portal?	For queries about presented accounts or displayed balances on your portfolio contact: Client Support Team Monday – Friday 09:00-17:00 +353 1260 0080
How do I change my password?	If at any point you need to change your password, this can be re-set from the website. Click on the 'Can't sign in' link and follow the instructions to change your password.
What should I do if I've forgotten my password?	If at any point you forget your password, click on 'Can't sign in' link and follow the instructions to reset your password.
What are the software requirements for my device?	The portal is accessible through most modern browsers and mobiles, but if specific advice is required then please contact our Digital Channels Customer Support Team (see contact details above).

Notes

Brewin Dolphin Wealth Management Limited trading as RBC Brewin Dolphin is regulated by the Central Bank of Ireland. For UK clients only: RBC Brewin Dolphin is deemed authorised and regulated by the Financial Conduct Authority. The nature and extent of consumer protections may differ from those for firms based in the UK. Details of the Financial Services Contracts Regime, which allows EEA-based firms to operate in the UK for a limited period to carry on activities which are necessary for the performance of pre-existing contracts, are available on the Financial Conduct Authority's website. Registered office: 3 Richview Office Park, Clonskeagh, Dublin 14. Registered in Dublin, Ireland No. 235126

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