Brewin Dolphin

Your guide to BDClientView

(User Guide for Investors Only)

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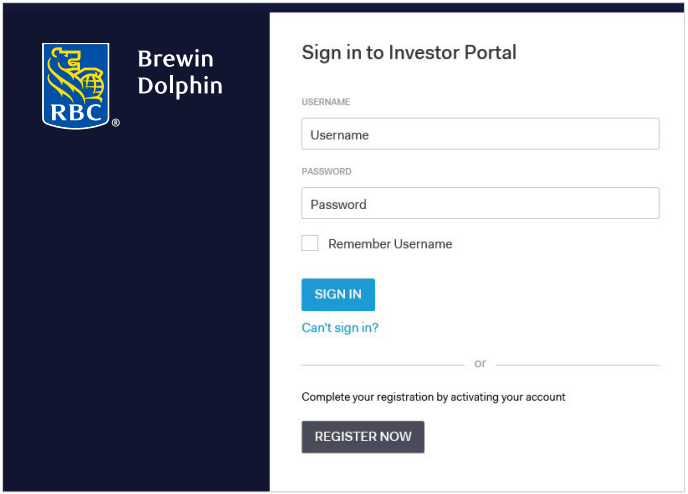
Registering for BDClientView

Step 1

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

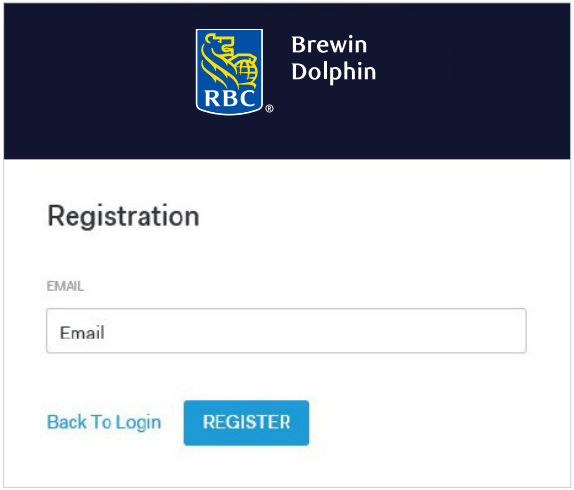
Step 2

Click on Register Now button.

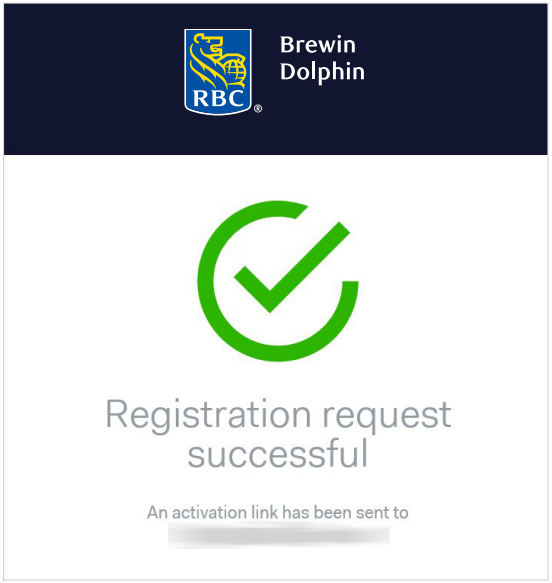


Step 3

Enter your email address then click the Register button.



If successful you will see the screen below.

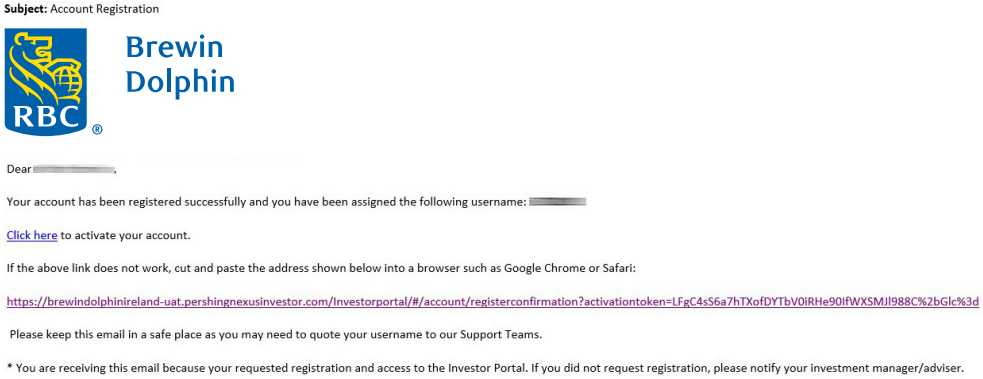


Step 4

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.



Subject: Account Registration

Brewin Dolphin

Dear [redacted],

Your account has been registered successfully and you have been assigned the following username: [redacted]

Click here to activate your account.

If the above link does not work, cut and paste the address shown below into a browser such as Google Chrome or Safari:

https://brewindolphinireland-uat.pershingnexusinvestor.com/Investorportal/#/account/registerconfirmation?activationtoken=LFgC4sS6a7hTXofDYTbV0iRHe90IfWXSMJl988C%2bGlc%3d

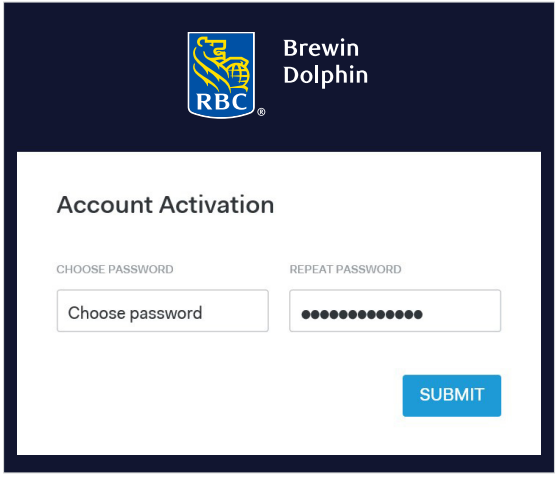
Please keep this email in a safe place as you may need to quote your username to our Support Teams.

* You are receiving this email because your requested registration and access to the Investor Portal. If you did not request registration, please notify your investment manager/adviser.

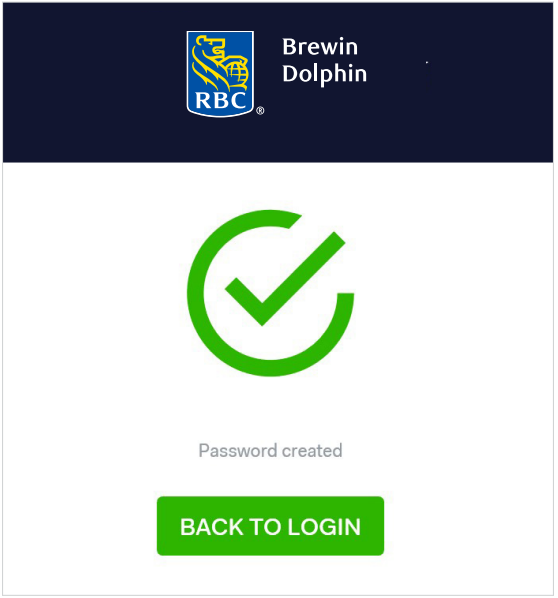
Step 5

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



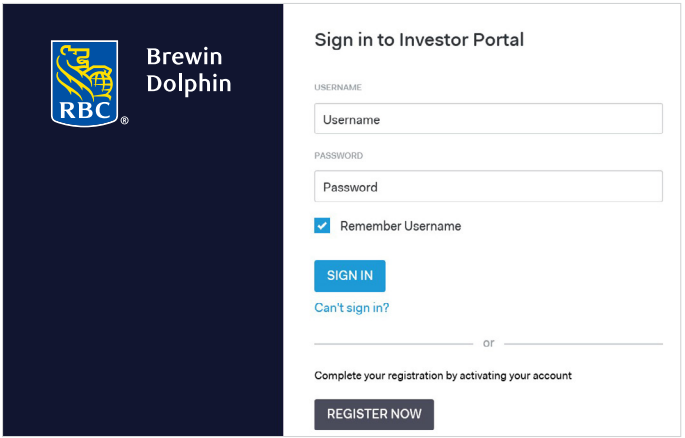
After entering your password you will see the screen below.



Step 6

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

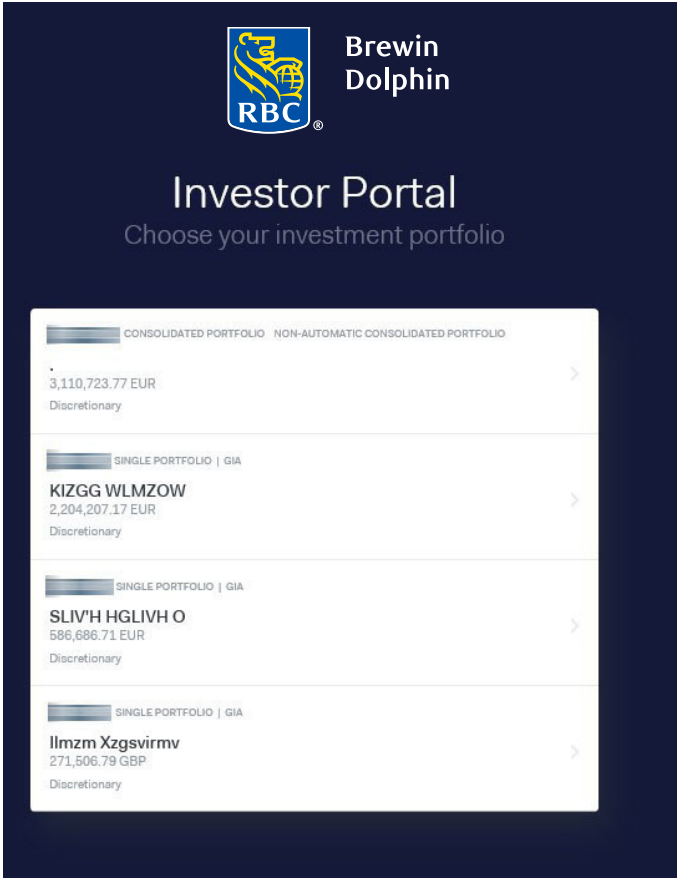
Please note: these are the details that you will need to enter each time you sign in.



Using BDClientView

Portfolio Selection

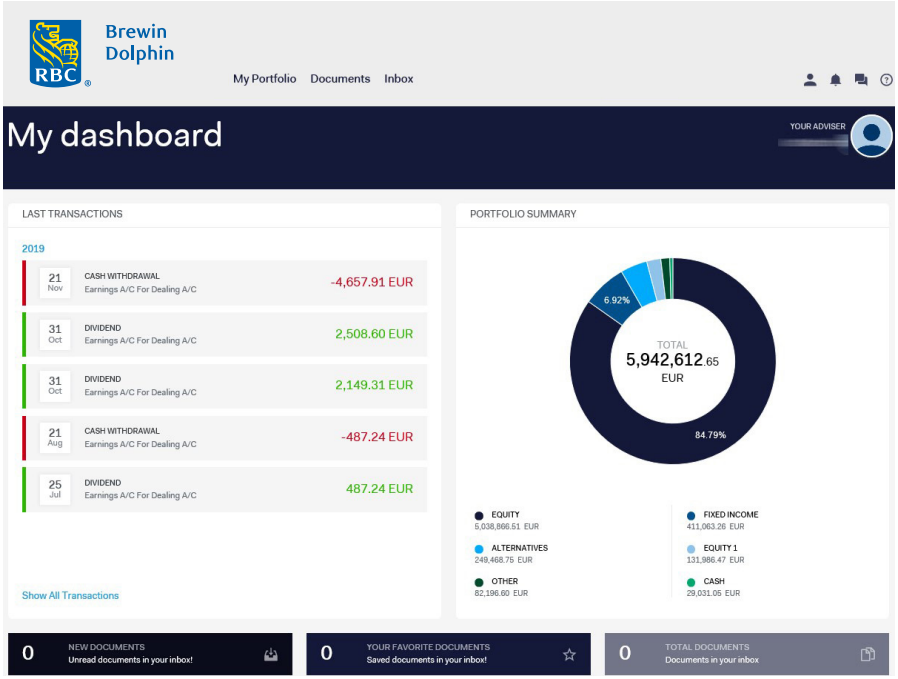
You will see this page if you have access to more than one portfolio. Click on the portfolio you would like to view first.



Using BDClientView

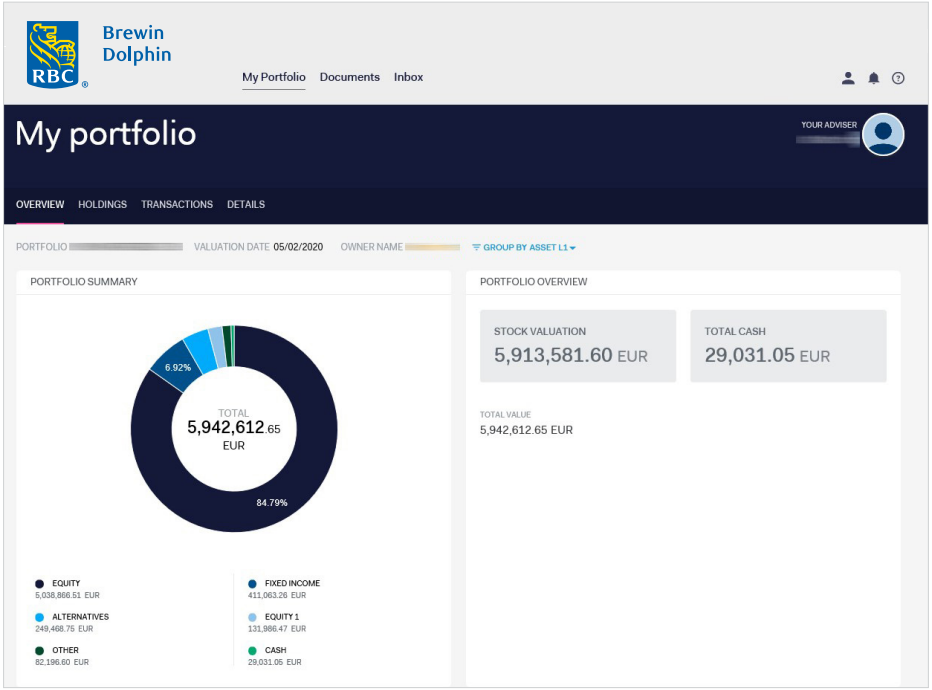
My Dashboard

This screen provides a high level summary of the portfolio.



My Portfolio

This screen provides a high level summary of the portfolio.



Click on the Brewin Dolphin icon to return to My Dashboard

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 individual tabs to navigate to:

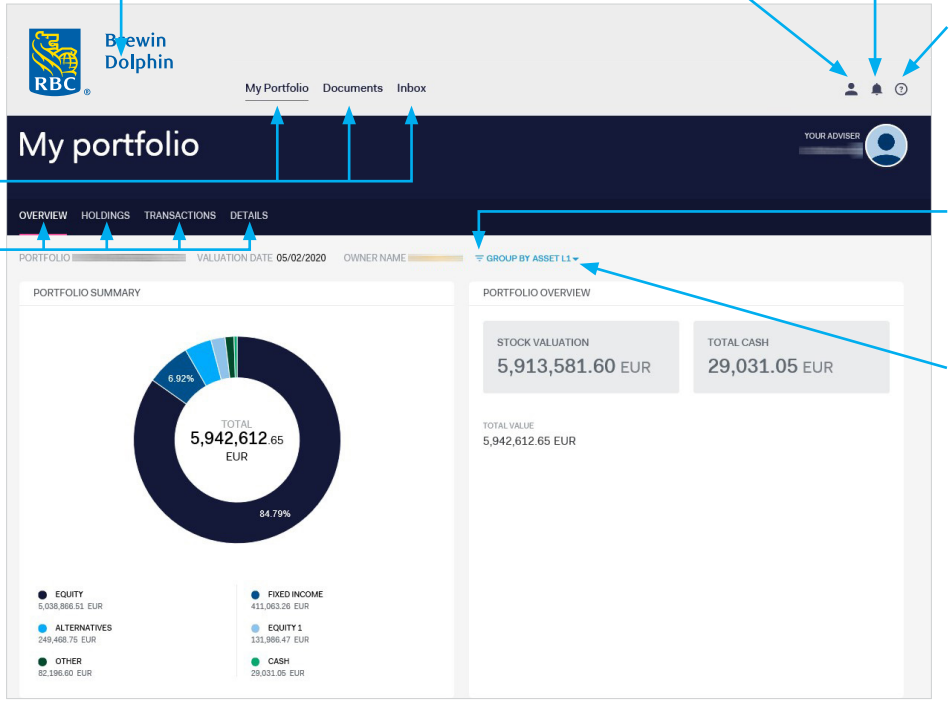
- My Portfolio screen or to
- View your Documents
- View your Inbox for messages

Click on this arrow to collapse the list.

Click on the individual tabs to navigate to:

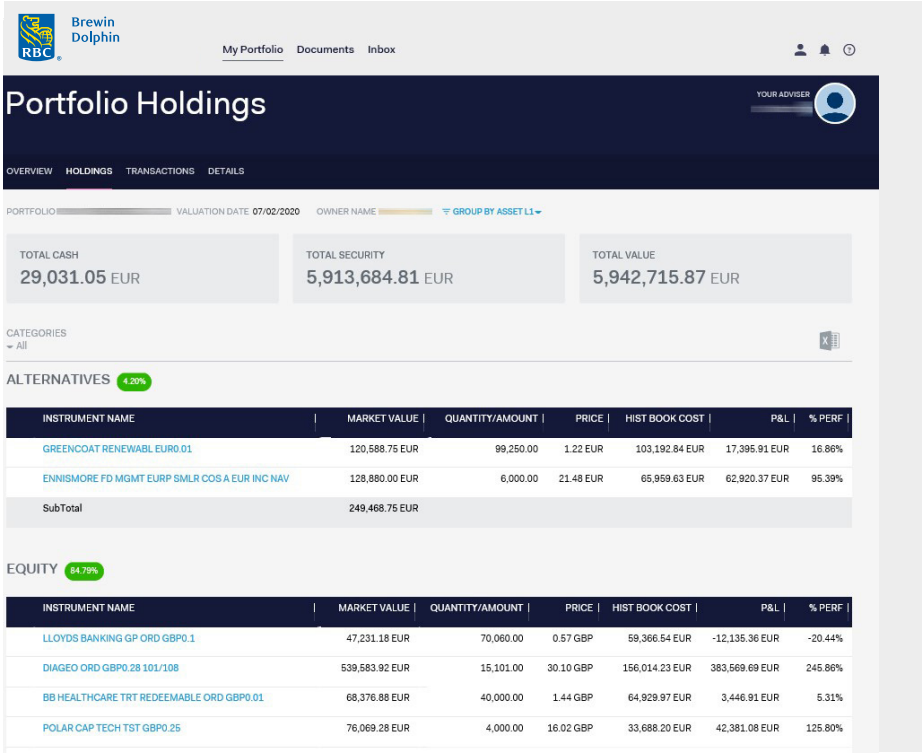
- Your Holdings
- Your Transactions
- Your Details

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



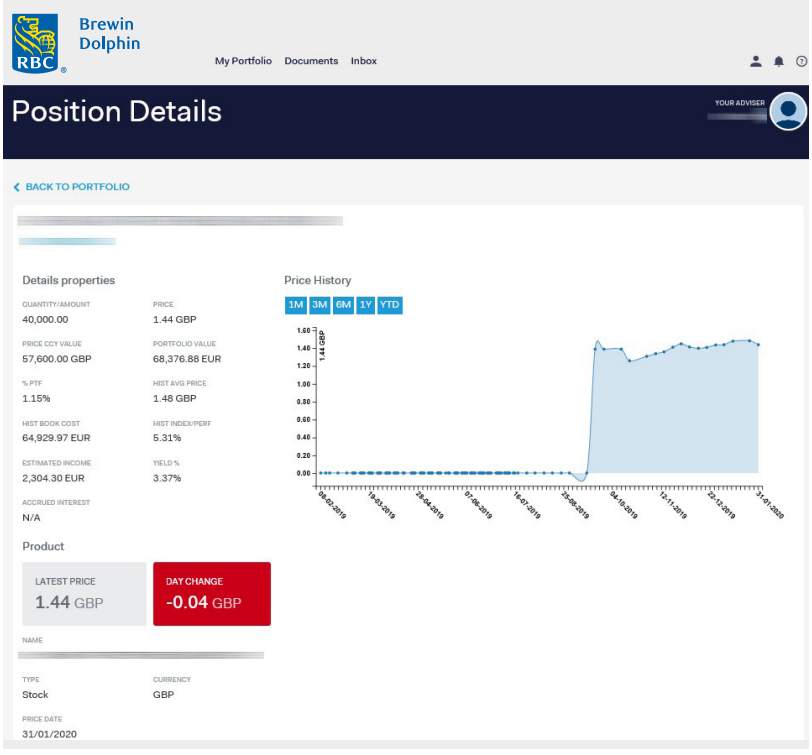
Portfolio Holdings

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.



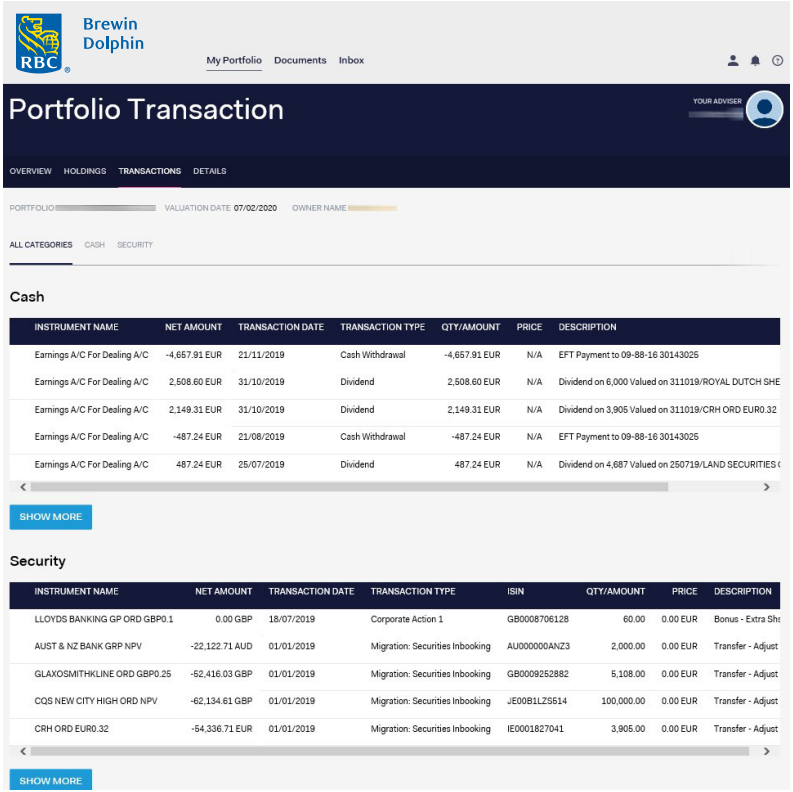
Position Details

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



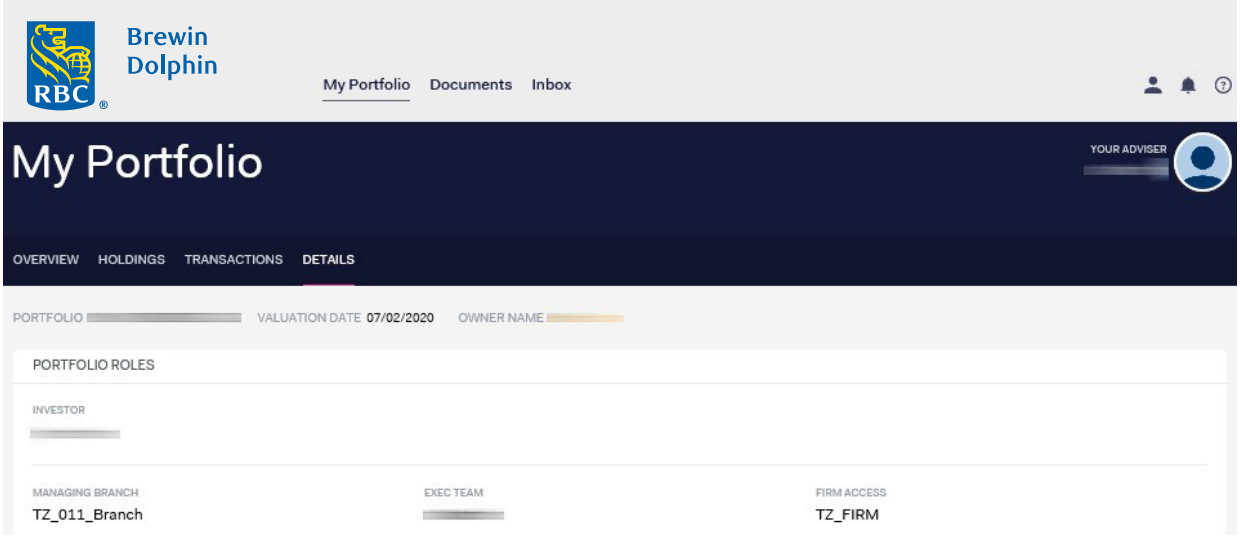
Portfolio Transactions

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



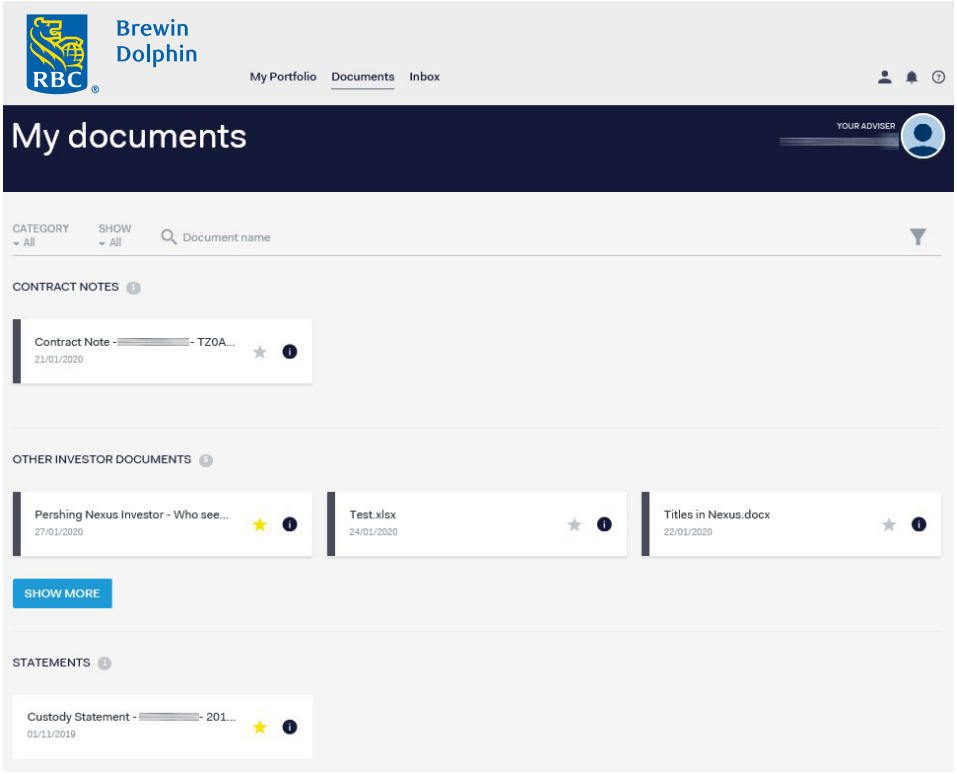
Details

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



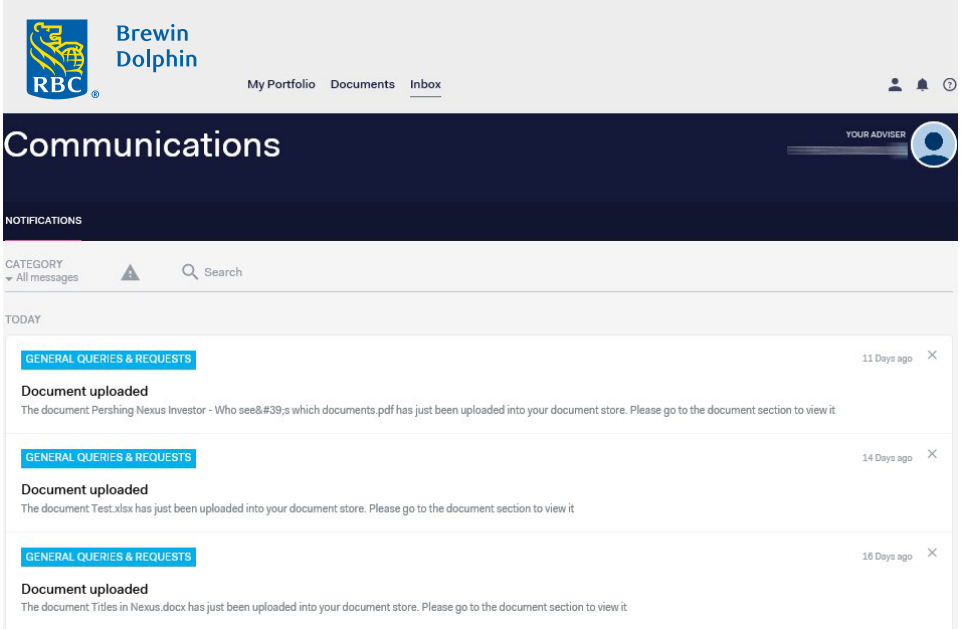
Documents

This page provides a list of all your documents uploaded onto the portal.



Inbox

This page provides a list of notifications for documents that have been loaded to the portal.



Frequently Asked Questions and System Requirements

All details can also be found within BDClientView.

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 +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 the Digital Channels Customer Support Team (see details above).

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