JM FINN

Investment | Wealth



MyJMFinn User Guide

User guide for your MyJMFinn portfolio

Welcome to your MyJMFinn account.

An online portfolio valuation tool that meets the requirements of today's investor.

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Your MyJMFinn User Guide

MyJMFinn gives you a secure way to access up-to-date information on your portfolios whenever you like.

This is a step-by-step guide to help you set up access to MyJMFinn. If you have any questions about the process, please contact your investment manager.

What are the key benefits of MyJMFinn?

- Secure login with multi-factor authentication
- All documents in one place (no paper required)
- Real-time portfolio access
- Secure messaging with your investment team
- Available via desktop and mobile app

How to set up your new account

1. Receive your activation email

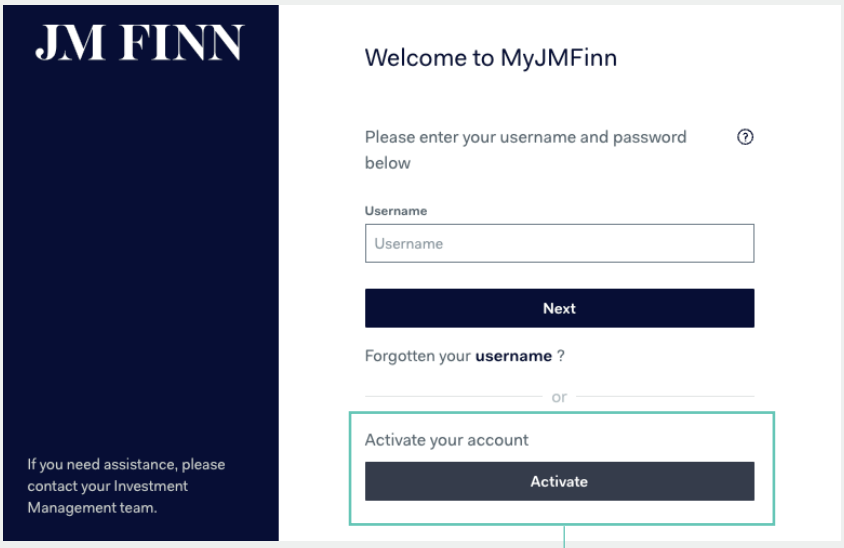
You will receive an email to the email address we hold on account for you, inviting you to access MyJMFinn.

This email will include a link to MyJMFinn and your customer ID, which will be required to activate your account.

2. Activate your account

Please click the link provided in your email. You will be taken to the login page.

Important:
On your **first visit**, please select "**activate your account**" rather than entering your username at the top.

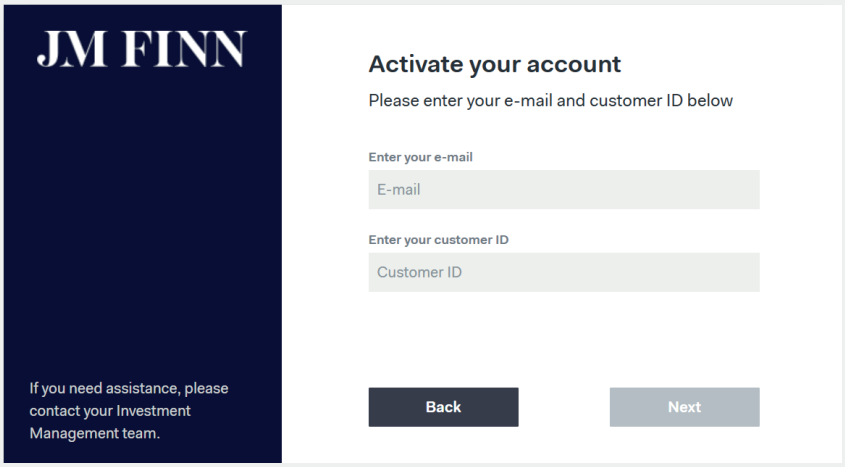


3. Enter your details

After clicking **'activate your account',** you will be asked to provide:

— Your email address

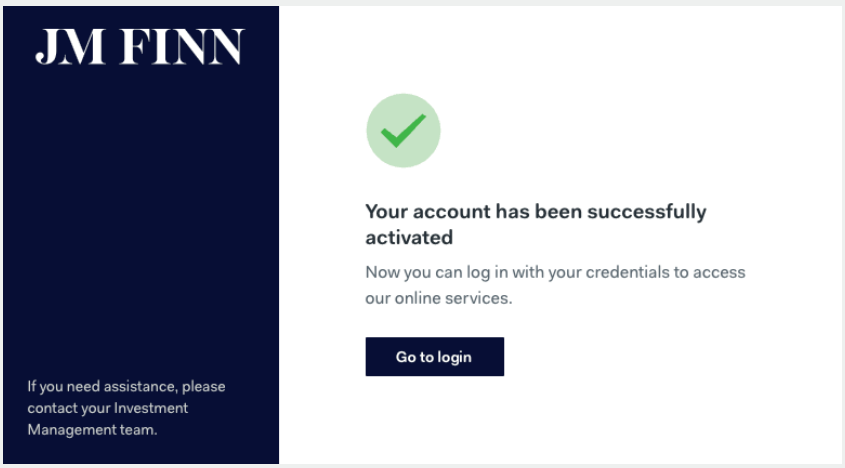
— Your customer ID (from your email)



Confirmation of successful account activation

Once you input your email address and customer ID, you will then see a screen that notifies you that your account has been successfully activated.

Click on the '**go to login**' button.



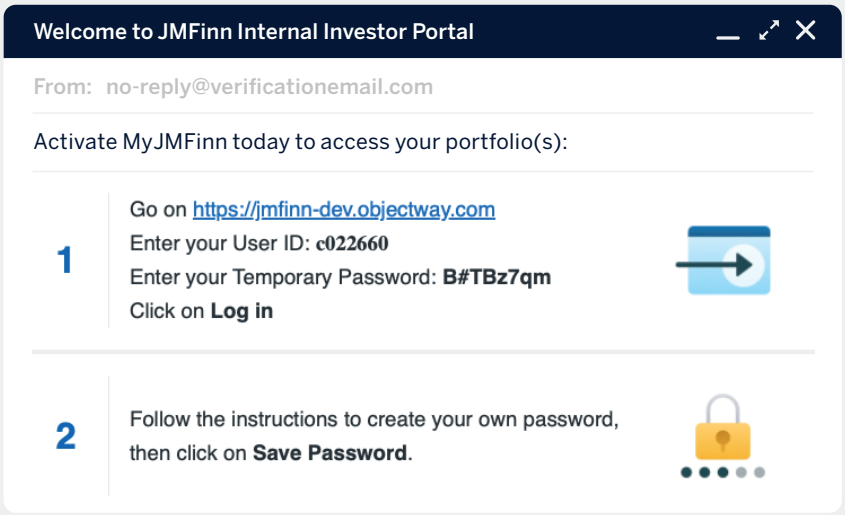
4. Receive temporary login and password to your email

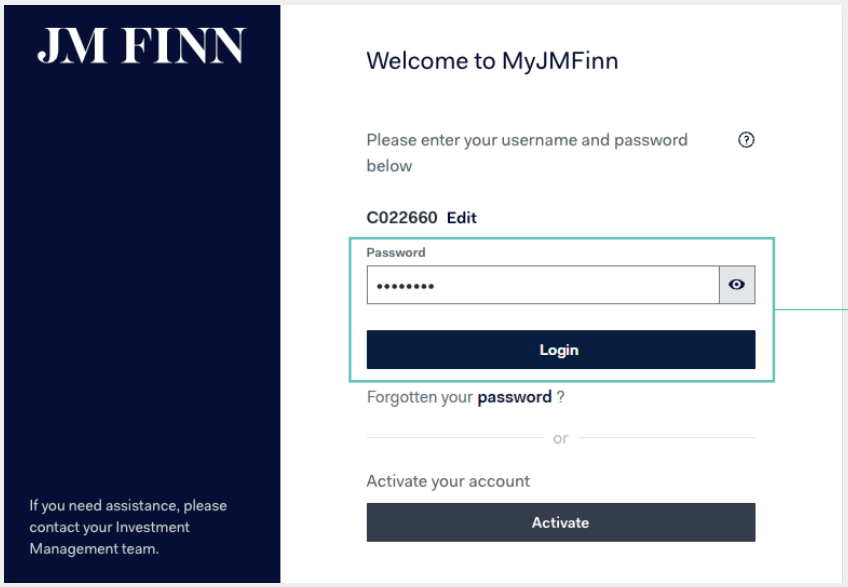
Once you see the screen that informs you your account has been activated, the account activation will trigger an email with a temporary login and password. **This password is valid for 24 hours.**

The email may take a few minutes to arrive, please check your junk mail folder if you can't see it in your inbox.

Click the link in the email to return to the login screen shown below.

Please enter your customer ID and the temporary password that you received in the email, then click on the **'login'** button.





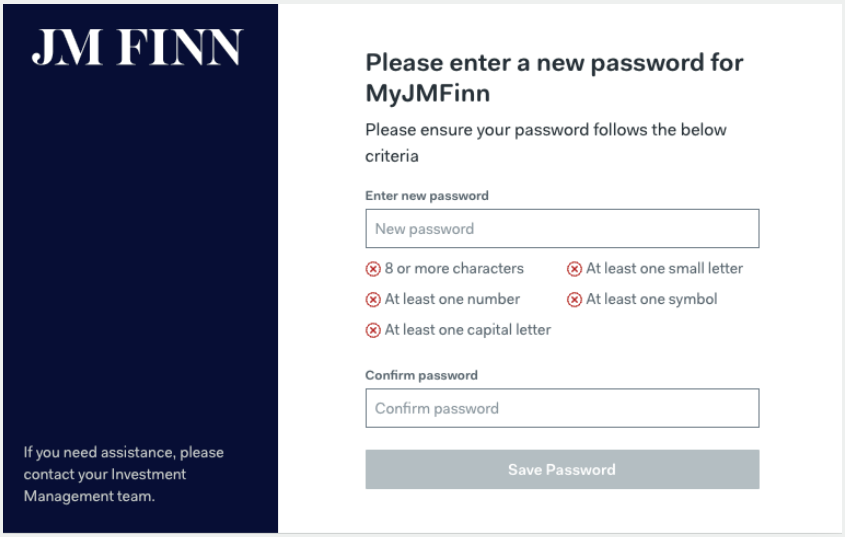
Note – when copying the temporary password from the email, be careful to copy only the text, not any blank spaces before or after the password.

5. Create your password

Once you click the **'login'** button, on the next page, **you will be prompted to create a new password**.

Please enter a password, ensuring that it complies with the criteria that are shown on the screen. Re-enter the same password in the box that reads **'confirm password'**, ensuring that the passwords match.

Once they do match, the option to click the save password button will appear – please click the **'save password'** button.



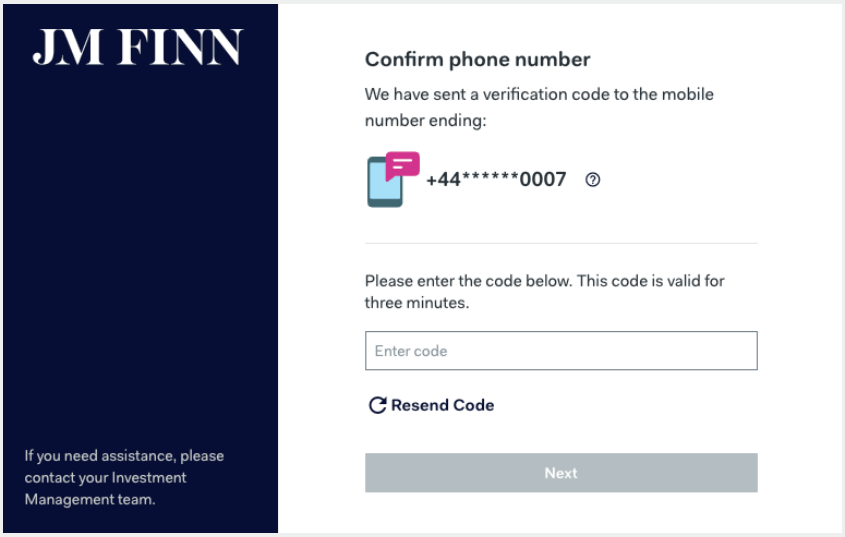
6. Verify your mobile phone number

Once you click **'save password'**, the next screen confirms that a text message has been sent to your mobile phone with a code.

The code will be sent to the mobile number we have registered for your account. The screen will show part of your phone number, for security reasons it will not be displayed in full.

Please check your mobile phone's text messages and enter the code in the box on the screen that reads **'enter code.'**

The code will be valid for 3 minutes, you have the option to resend it if you take longer than this.

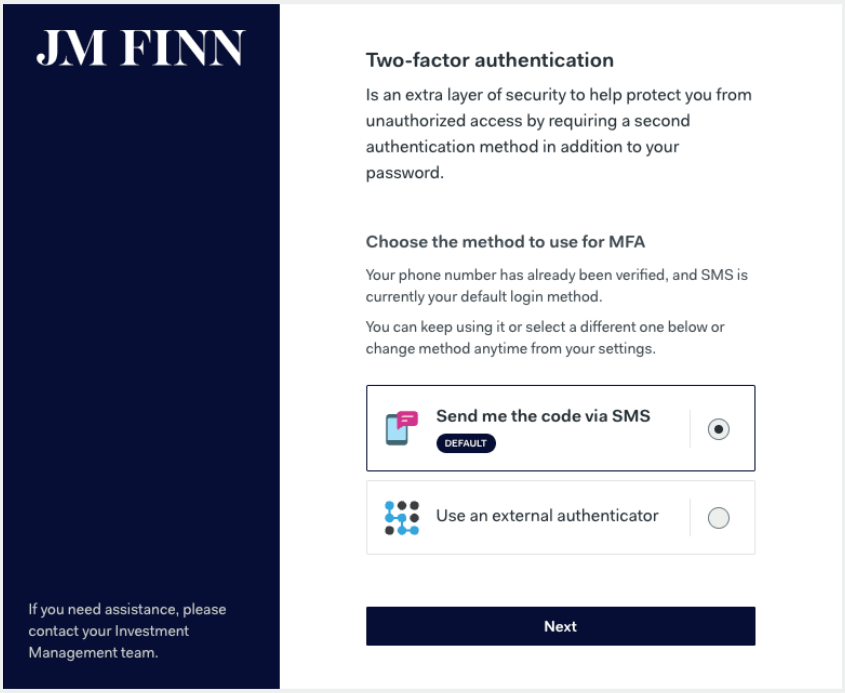


7. Choose a multi-factor authentication option

Once you enter the code, the next screen will display two options to set up multi-factor authentication as an extra layer of security when you login to MyJMFinn each time. By default, this is set to be a code sent to your mobile phone each time you log in.

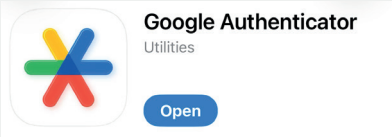
Option 1: multi-factor authentication by phone

If you wish to keep the multi-factor authentication option as your phone, click next.



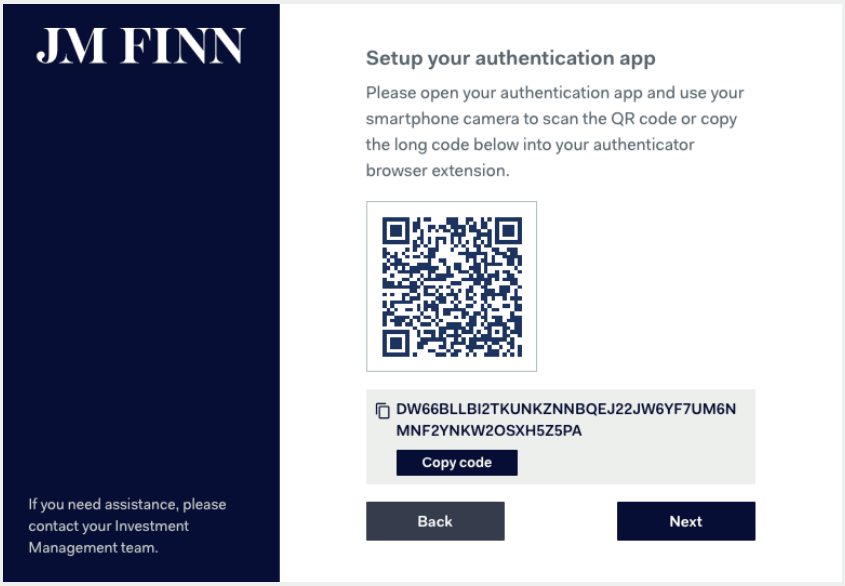
Option 2: multi-factor authentication by app

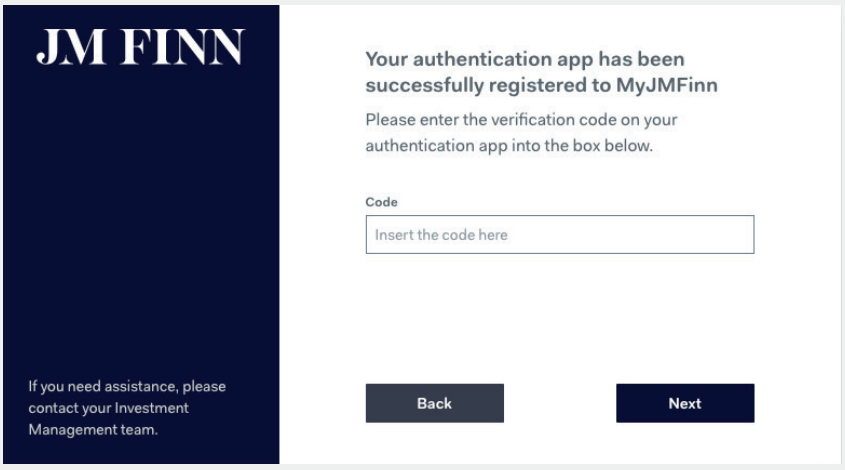
If you prefer to use an authenticator app, you will need to download an authentication app such as Google Authenticator or Microsoft Authenticator on your phone.



Once you have done so, on the login screen click the option to use an external authenticator, then click **'next'** and follow the instructions.

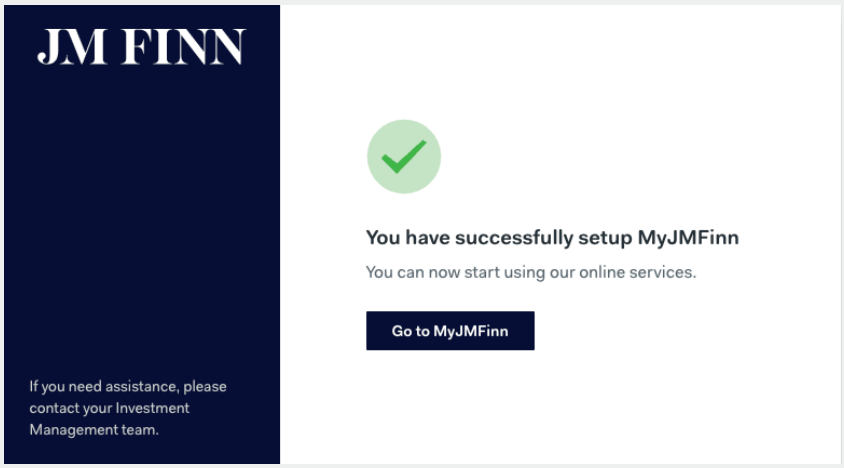
Open the app and use it to scan the QR code shown on screen. The app will generate a code, which you will need to enter to complete the setup, as shown in the screenshots.





8. Your MyJMFinn account is now set up!

Once multi-factor authentication is set up, your account is ready to use. Click the **'Go to MyJMFinn'** button to log in to MyJMFinn with your new login details.



9. Logging in after activation

Each time you log in via desktop:

1. Enter your customer ID and password
2. Enter the verification code (sent via text to your phone or the authenticator app)

If using the mobile portal app: You may be able to log in using face recognition or device security, depending on your device.

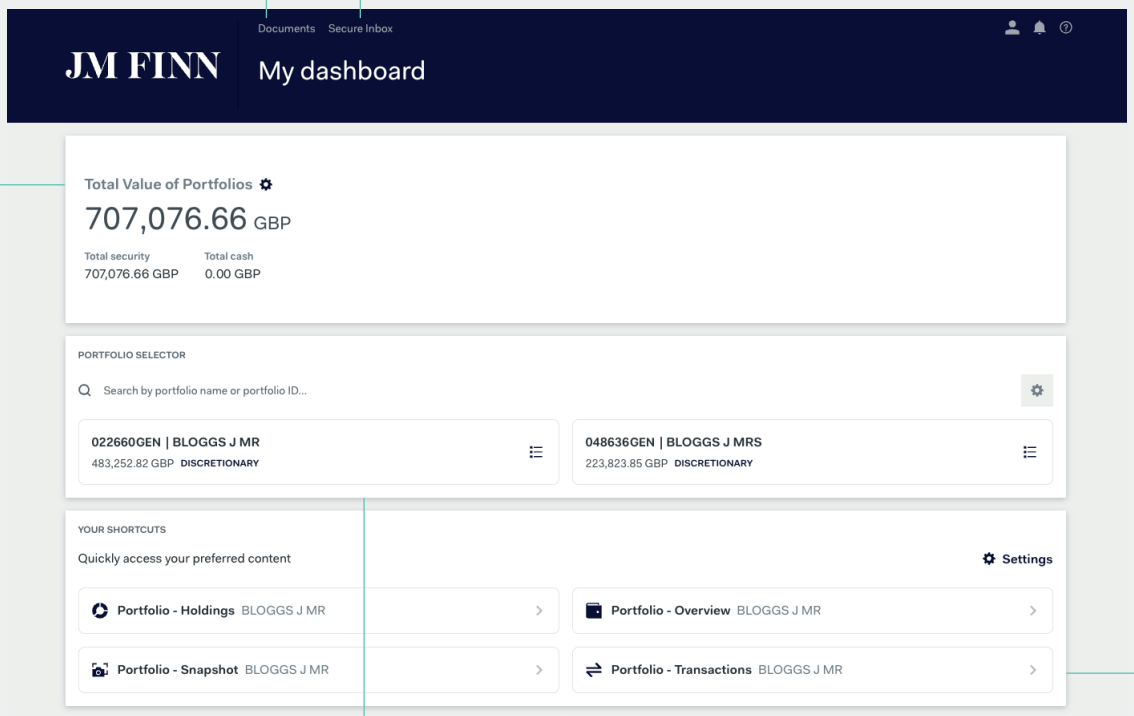
How to use MyJMFinn

Home dashboard – The dashboard provides an at-a-glance overview of all portfolios held with JM Finn and a central repository of all documents in one secure place. You can also securely send and receive messages with your investment team.

Documents – securely access historic portfolio documents.

Secure inbox – exchange messages with the investment team.

Please note - the secure inbox function is only available for direct clients, not intermediaries.



Total value of portfolios – an instant, up-to-date picture of the total value of portfolios.

Portfolio selector – you can navigate to portfolios by clicking on them in the portfolio selector section.

Shortcuts – Create quick links to frequently used pages.

Portfolio code guide:
GEN - A taxable account; **ISA** - A non taxable account; **CNS** - Both the GEN and ISA portfolio; **JTA** - If a joint portfolio is held; **PEN** - If a pension portfolio is held.

Overview

This overview gives you a more detailed view of what the portfolio is invested in.

Return to dashboard – Click the JM Finn logo to return to the dashboard.

Total portfolio – value in local currency.



Portfolio summary – this shows the asset allocation split of the portfolio between different asset classes such as equities, fixed income, diversifiers and cash – both as a percentage of the portfolio and as a monetary value.

Top holdings – the overview page also shows you the main holdings in the portfolio.

Holdings

The holdings page allows you to view all investments in the portfolio including:

— Book cost

— Current values (displays the price of all holdings as at the start of business on the date shown on the page)

— Gains or losses

— Estimated income

Use the filters on screen to:

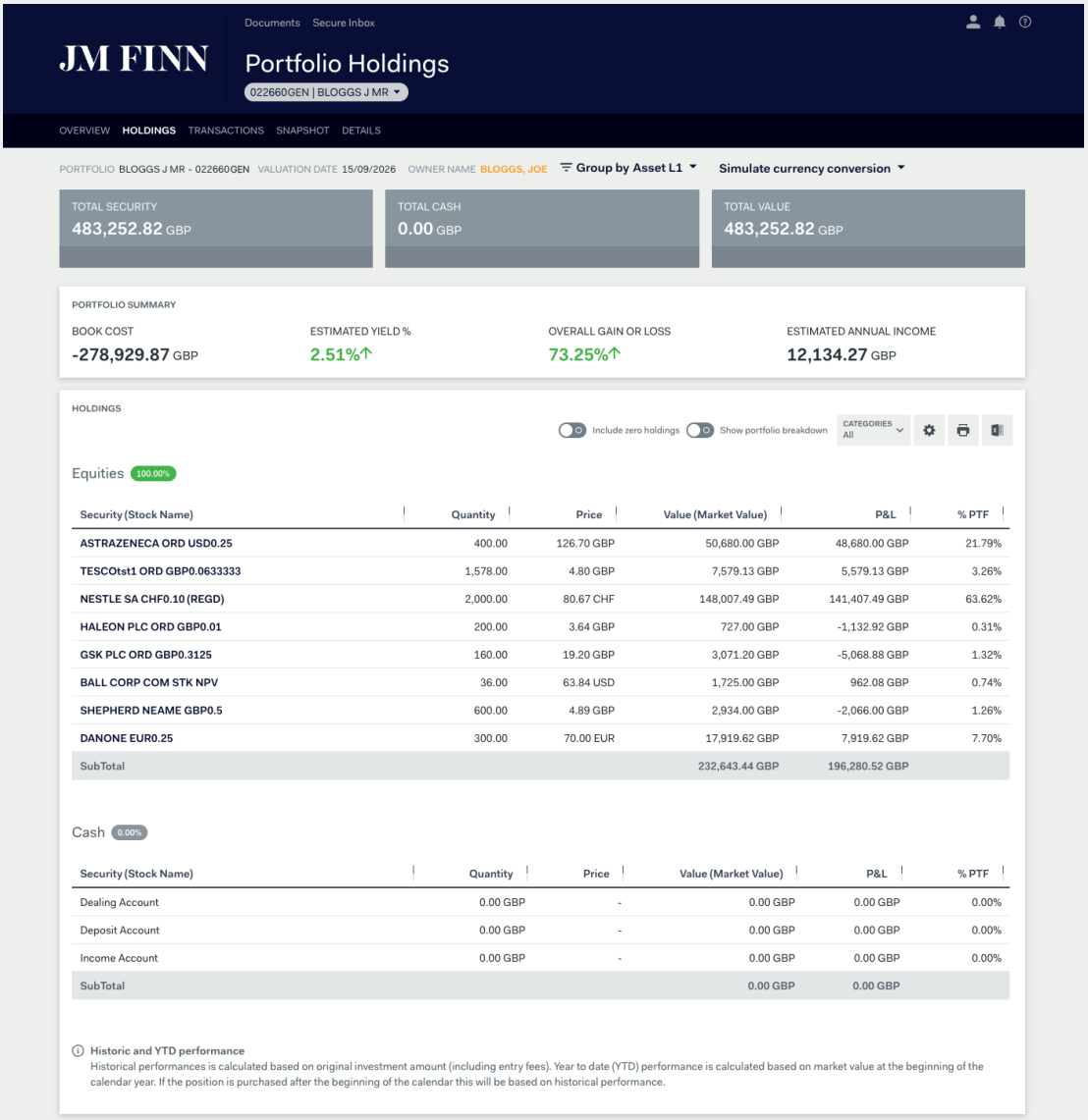
— Sort columns (e.g. by value or quantity)

— Group holdings (e.g. by sector)

— Filter assets

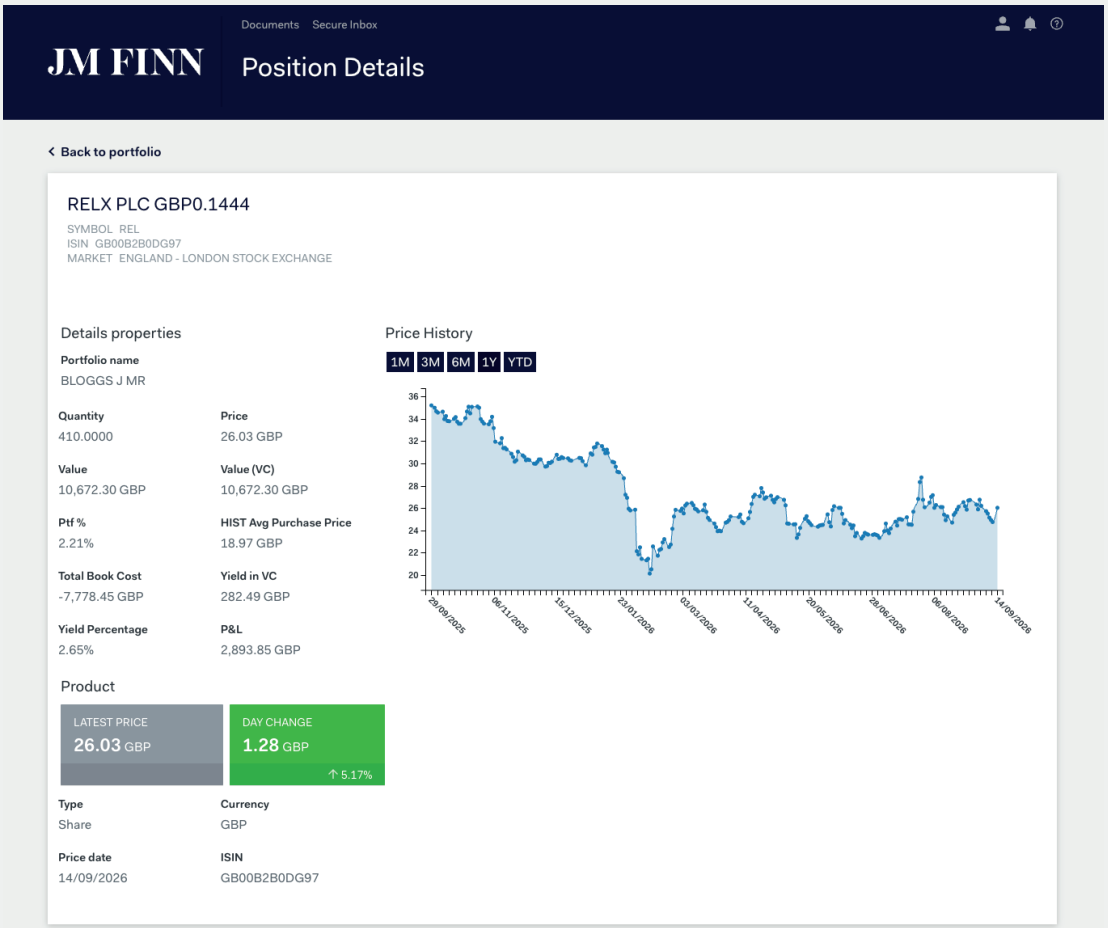
— Customise which columns are displayed by clicking on the cog icon

— Export information into a spreadsheet



Position details

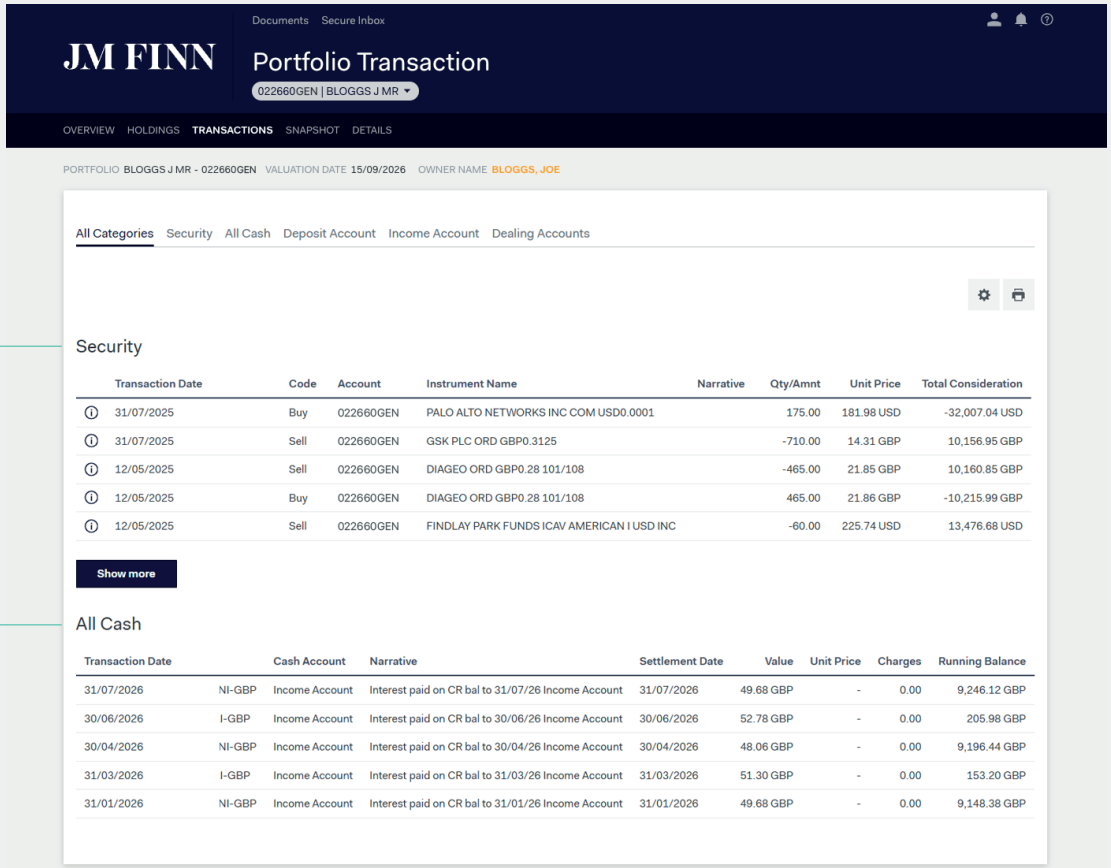
If you click on a holding listed on the holdings page, this will take you to the position details page. Here, you can see the price history of the stock over the past month, three, six months or year.



Transactions

This section shows all transaction activity for the portfolio and can be filtered to view security or cash transactions separately. By selecting each tab individually, additional filters can be added to tailor the view.

Securities tab – This shows investment purchases and sales, as well as corporate actions.



Cash tab – The cash tabs display income payments, deposits, withdrawals and transfers.

Portfolio snapshot (historical view)

This section provides:

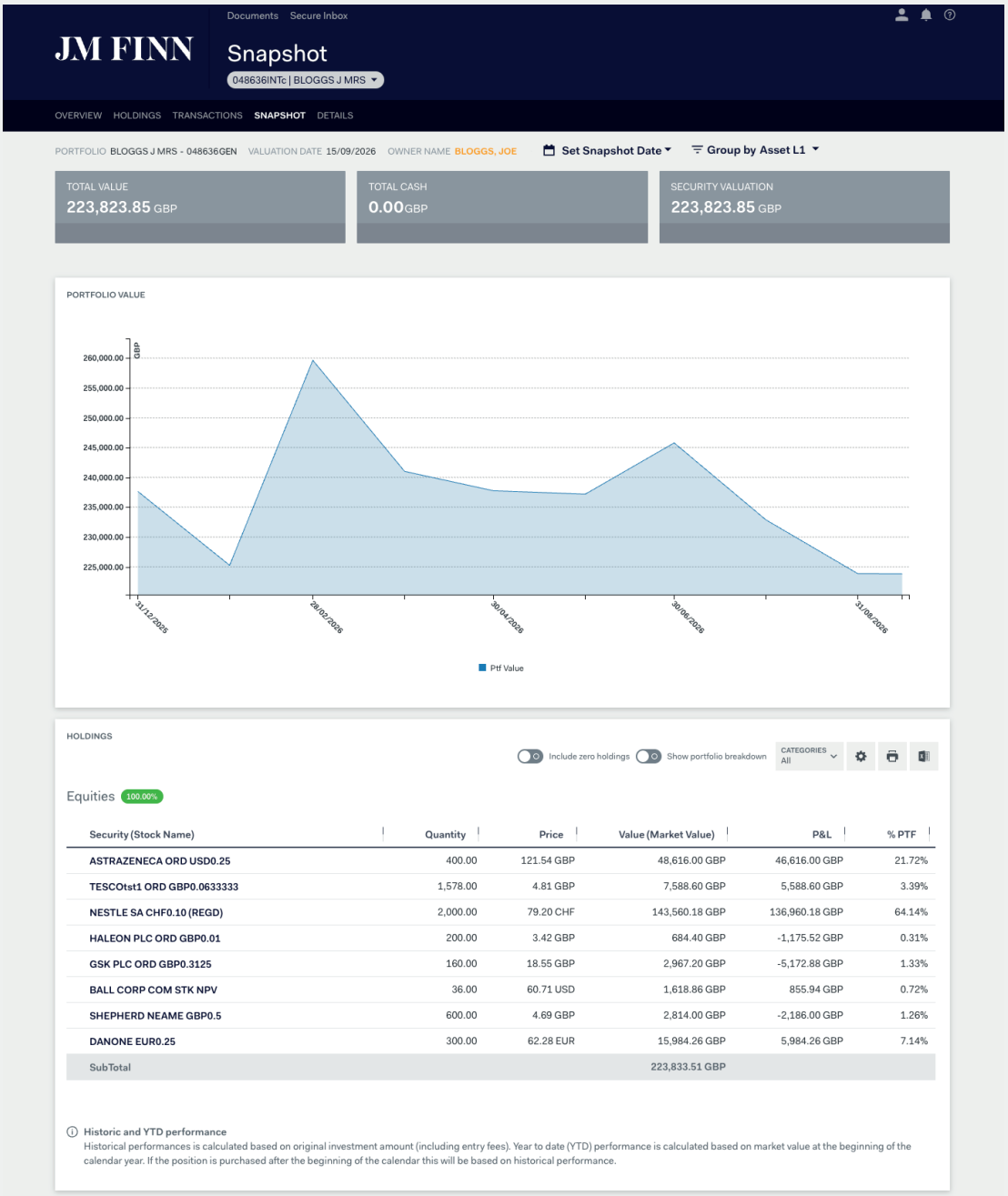
— A graph showing the portfolio value over time

— A historical snapshot of the holdings

You can:

— Select a date to view what the portfolio looked like at that time

— View how the portfolio value has changed (note: this shows value movement, not formal performance reporting)



Documents

Displays **up to 3 years** of documents in one place, including:

— Periodic statements

— Contract notes

— Portfolio reports

You can:

— Filter by document type

— View documents as a list or grid

Secure inbox

The secure inbox allows you to communicate safely with your investment team.

You can:

— Send messages directly to your investment manager

— Receive replies within MyJMFinn

— View message history and threads

Messages are:

— Fully secure

— Not sent via standard email

You will also receive notifications within the portal when a new message arrives.

Notifications

A notification icon shows when you have:

— New messages

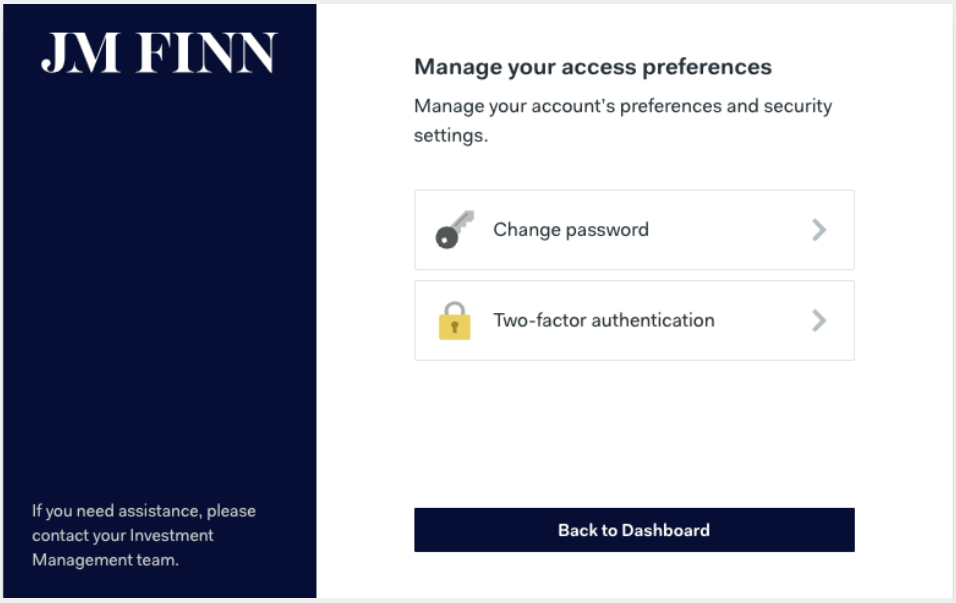
— Updates requiring attention



Note: the secure inbox function is only available for direct clients, not intermediaries.

Security settings

You can change your password or switch your multi-factor authentication method.



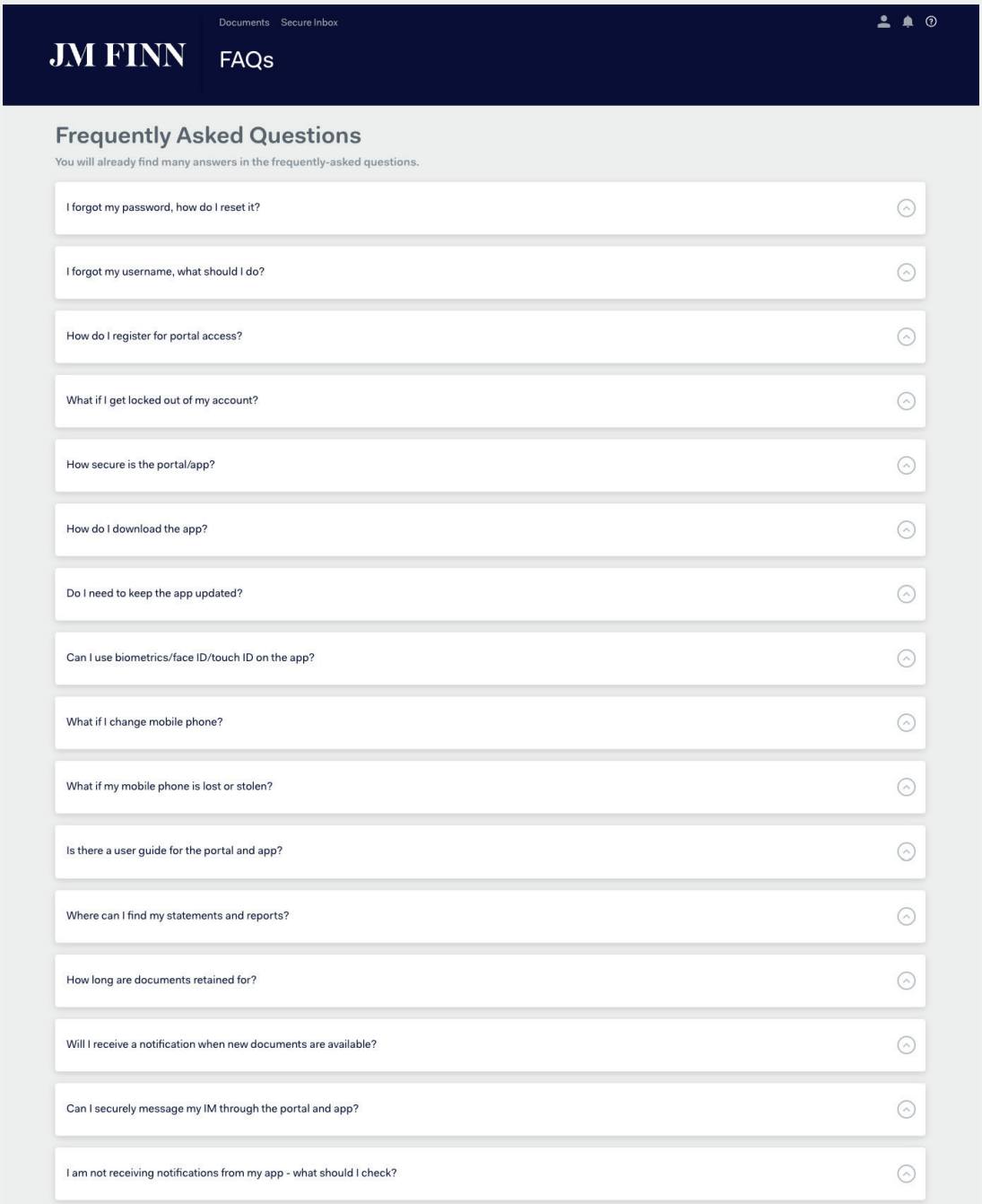
Frequently asked questions (FAQs)

Use the help icon to access a range of commonly asked questions such as:

— Logging in

— Using features

— Troubleshooting



Download the MyJMFinn app

The MyJMFinn app is available on iOS for Apple users and on Android for Android smartphones.

Key features	Website	App
Register access	✓	✓
View portfolios	✓	✓
View documents	✓	✓
Send secure messages	✓	✓
Change password	✓	✓
Device management	✗	✓
Change authentication method	✓	✗
Biometrics	✗	✓

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