JM FINN

Investment | Wealth



MyJMFinn App User Guide

User guide for your MyJMFinn app

Welcome to the MyJMFinn app.

This is a step-by-step guide to help you set up and use the MyJMFinn app. If you have any questions or need assistance, please contact your investment manager.

Download on the App Store

GET IT ON Google Play

Contents

3 Activating MyJMFinn through the app

5 After activation

6 MyJMFinn app features

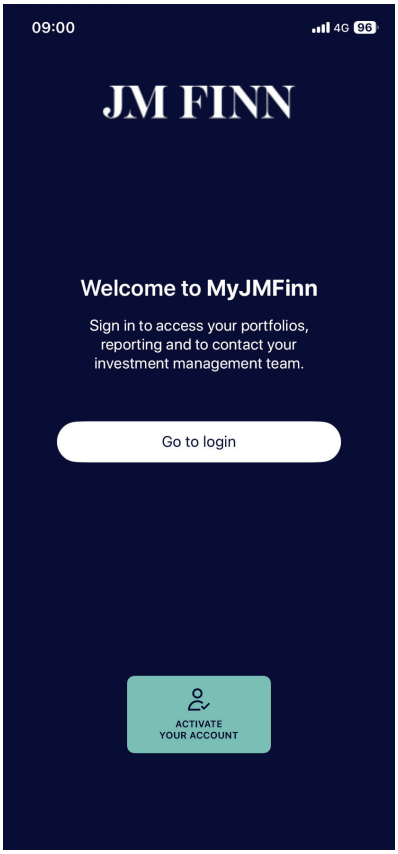
8 Password and username recovery

Activating MyJMFinn through the app

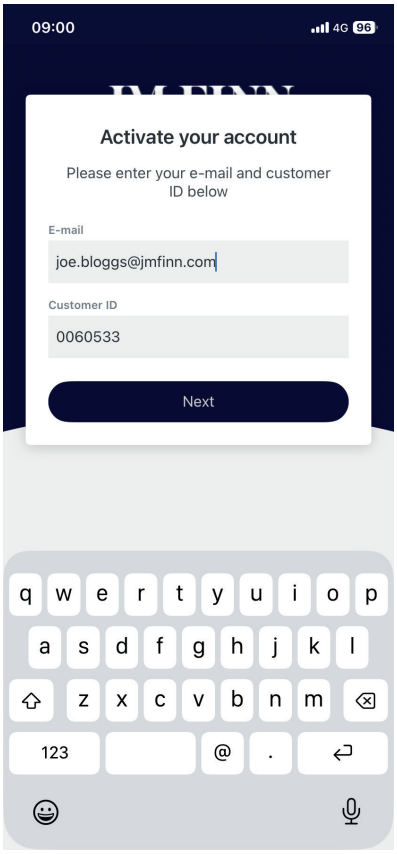
1. Download the MyJMFinn app from the relevant app store on your mobile phone.

Download on the App Store

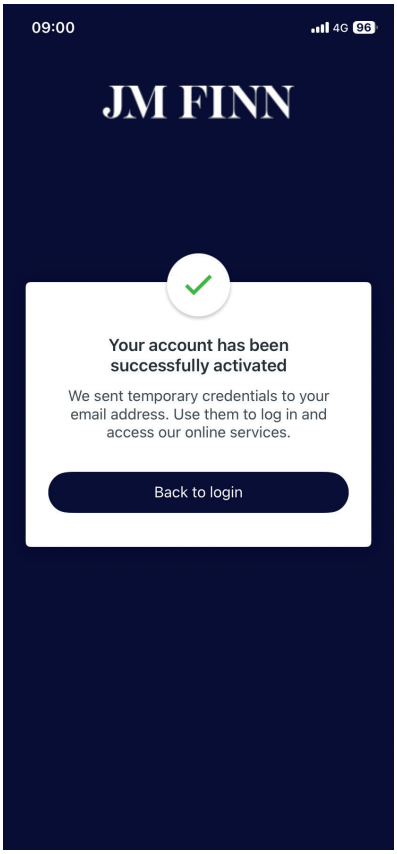
GET IT ON Google Play



2. Open the app. Click the '**activate your account**' button at the bottom of the screen.

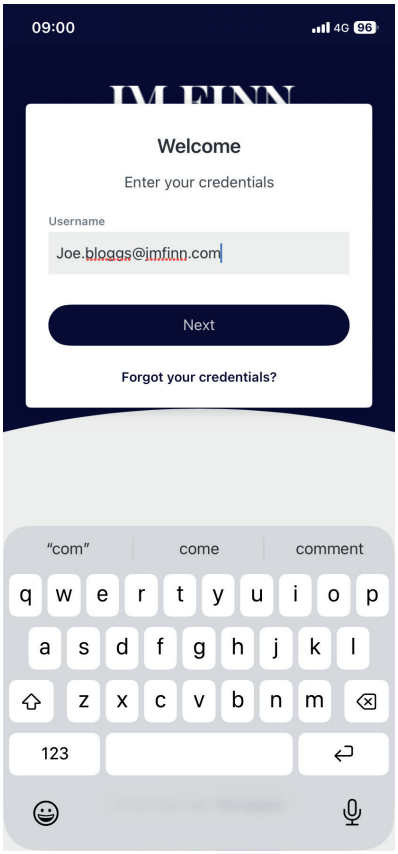


3. Enter your email address (note, this must be the email address JM Finn holds on file for you) and customer ID in the fields provided and then click the '**next**' button.

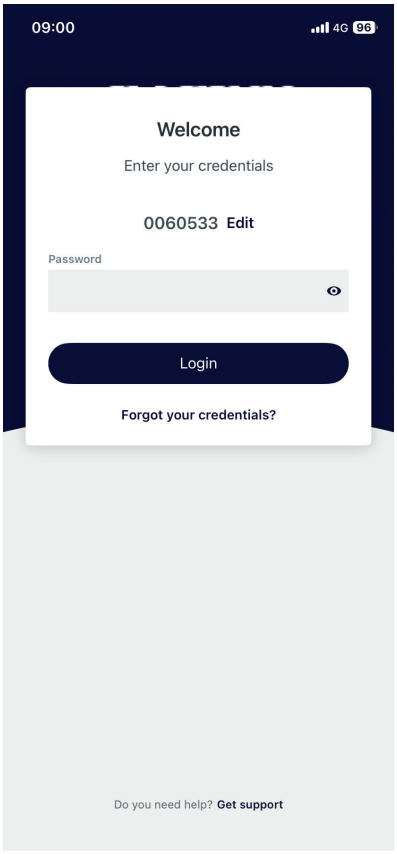


4. A pop-up message will confirm your account has been successfully activated. This will trigger an email with a temporary password to be sent to your email address.

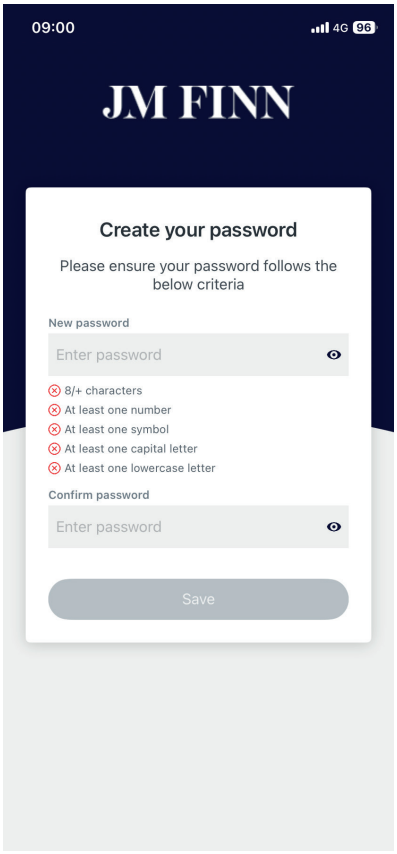
   Click the '**back to login**' button on the activation message.



5. Enter your username, click '**next**.'



6. Enter the temporary password from the activation email and click '**login**.'



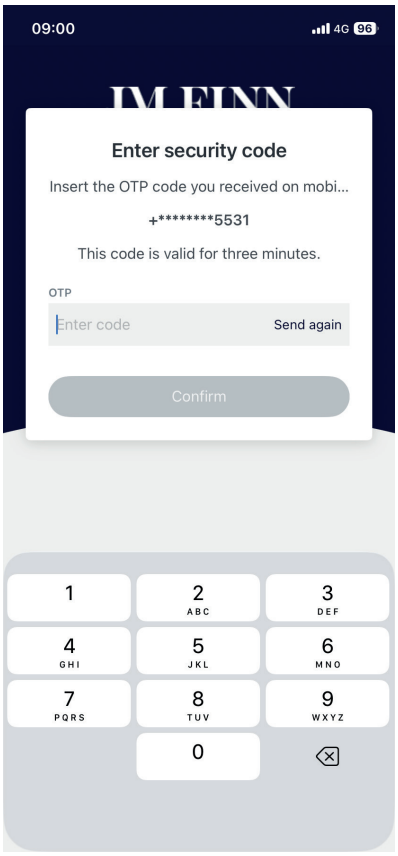
7. You'll be prompted to create a new password – do this following the criteria listed on the screen and enter in both fields on the screen, then click '**save**'.

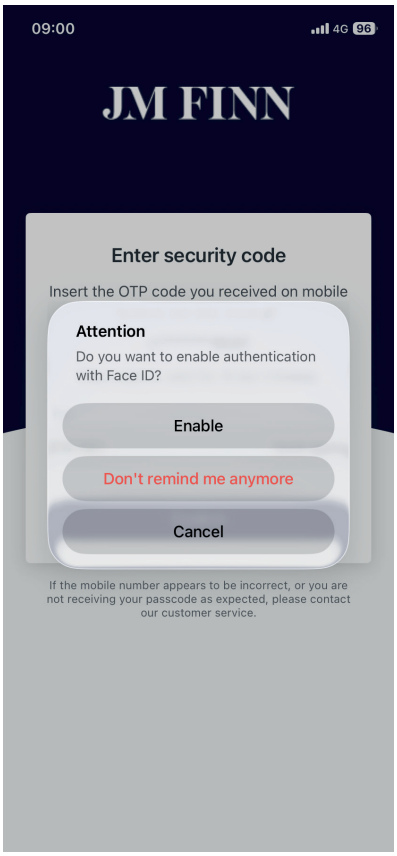
After activation

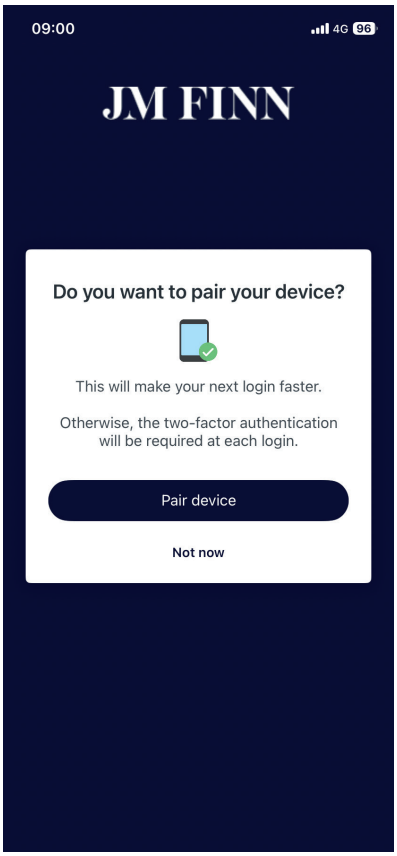
Once you've successfully created a new password, you will be prompted to enter a one-time security code – this will be sent to your mobile phone.

Ente the code and click '**confirm**'. You will be prompted to enable face ID to replace the need to enter credentials each time you log in.

Next, you will be asked to pair your device with the app to replace the need to receive a one-time passcode each time you access the MyJMFinn app.





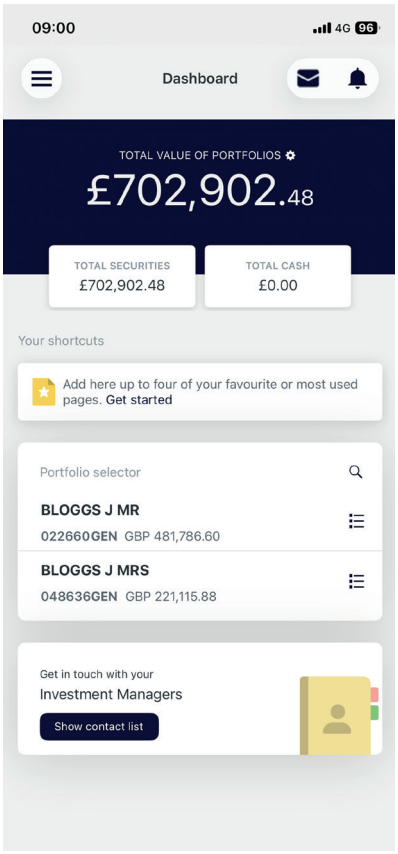


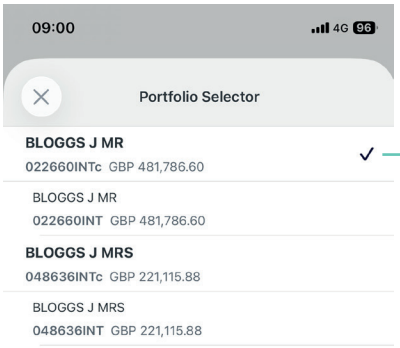
Once you have answered those questions, you will be directed to the dashboard.

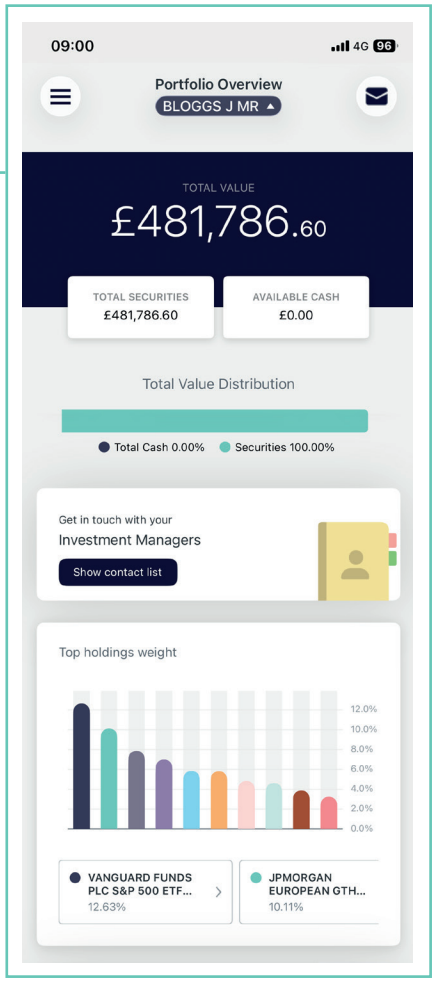
MyJMFinn app features

Once you are logged in, the features include the **dashboard**, where you can see the total value of the portfolios.

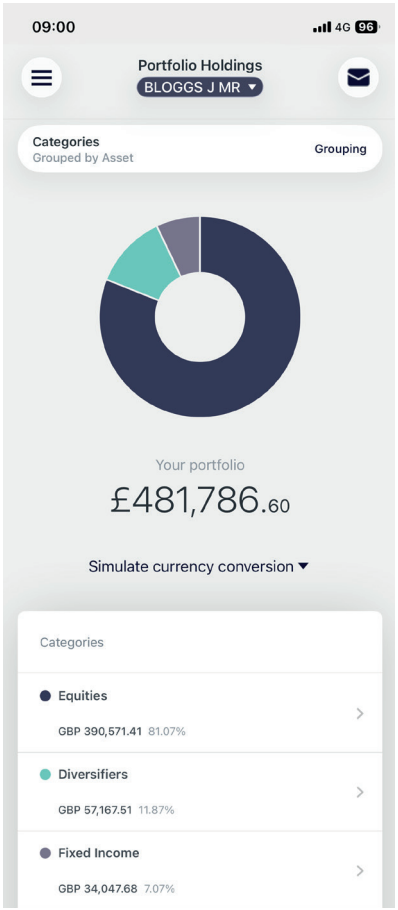
Clicking individual portfolios in the **portfolio selector** section allows you to see the total value and available cash in each portfolio.



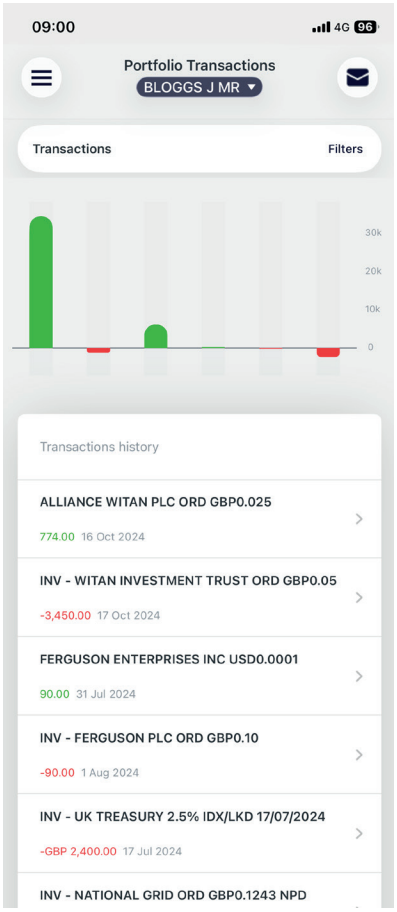


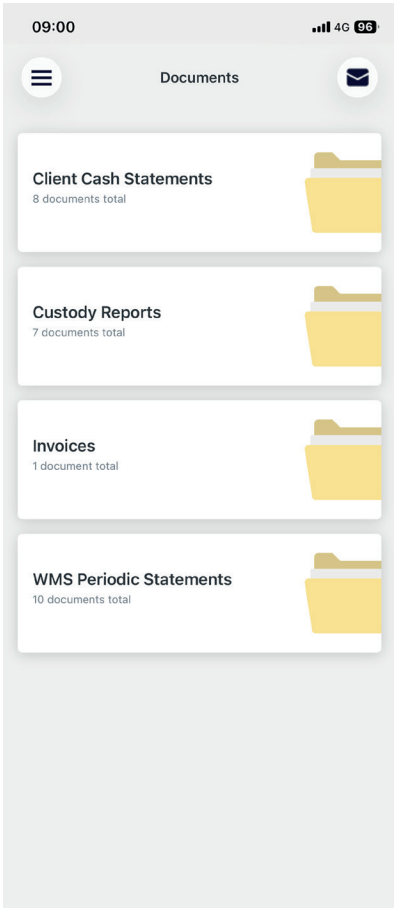


In **portfolio holdings**, you can see the breakdown of asset classes and individual holdings within the portfolio.

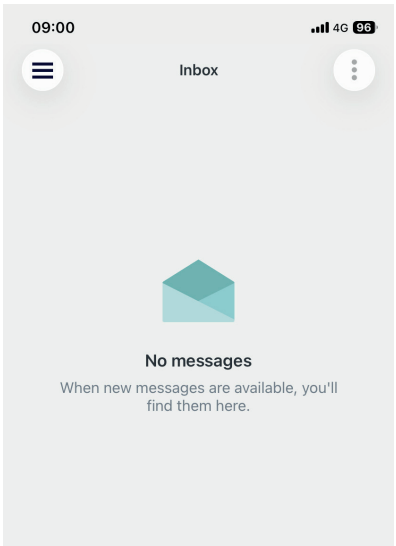


Portfolio transactions displays the transaction history of the portfolio.





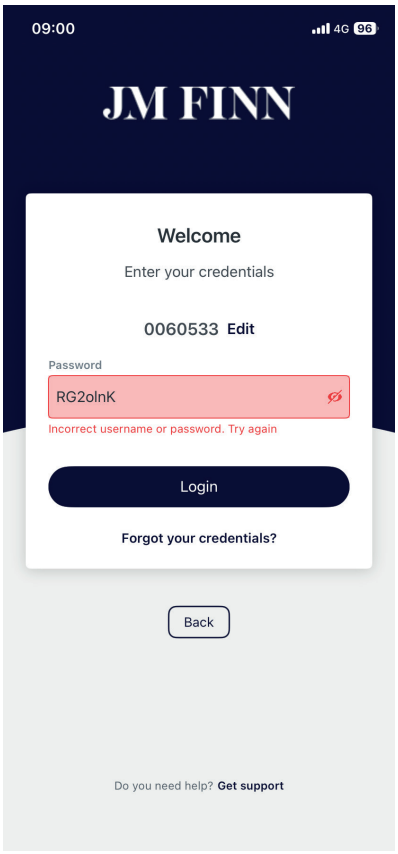
Inbox: clients can send and receive secure messages with the investment manager.

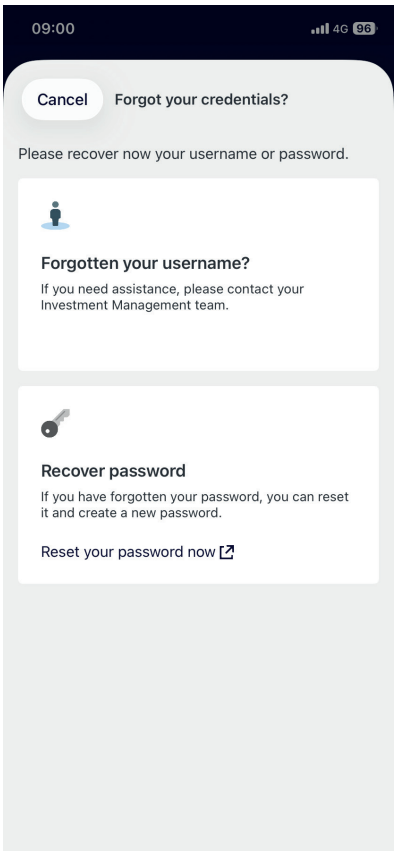


Under the **documents** section, you can access documents such as client cash statements and periodic statements. These are grouped by category.

If you forget your password or username once you set up your account

If you can't remember your password or username, click the '**forgot your credentials**' button and follow the instructions to recover your password.





Please note that if you've forgotten your username, you'll need to speak to your investment manager.

Download the MyJMFinn app from:

Download on the App Store

GET IT ON Google Play

Follow us on:

Registered Office:
25 Copthall Avenue
London EC2R 7AH

020 7600 1660
info@jmfinn.com
www.jmfinn.com

JM Finn is a trading name of J.M. Finn & Co.Ltd which is registered in England with number 05772581. Authorised and regulated by the Financial Conduct Authority.

MJMFAUG-01-0926