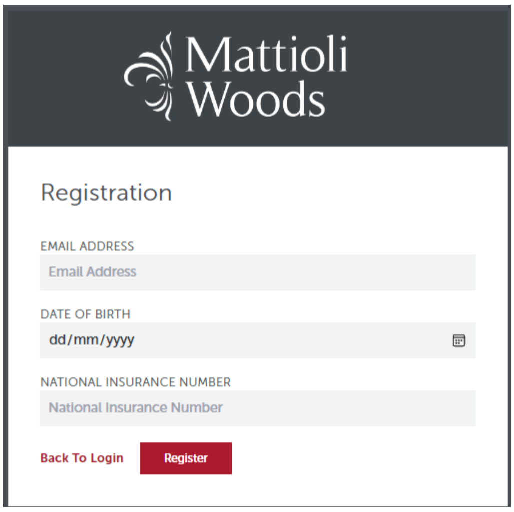
MWPortal client guide

Welcome to the MWPortal!
This guide will show you how to sign up for, sign into and navigate our new MWPortal.

Signing up

Please follow the link in the email you will have received to sign up for the MWPortal – from there you will be taken to the registration screen.



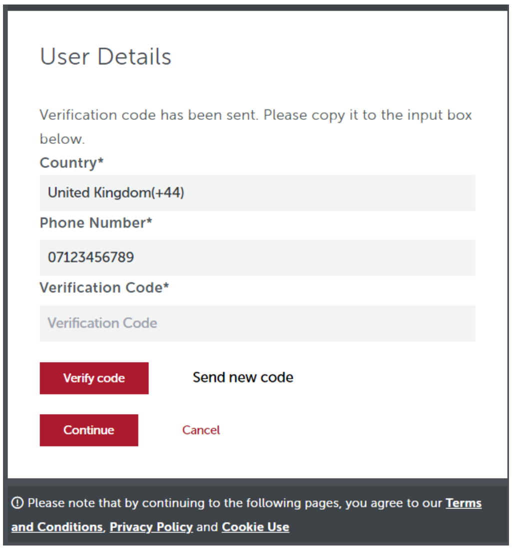
You will need to use the email address we have on file for you when you sign up for the portal. Then, simply enter your date of birth and National Insurance number and click 'Register'.

Your National Insurance number should be entered as all uppercase with no spaces, e.g. AB123456C and should only be nine digits long. Your year of birth should be written in full, e.g. 1991 not 91.

If you want to use an email address we do not already hold for you, please call your Client Relationship Manager (CRM) and they will add this to your file.

Activating your account

Once we have confirmed your details and set you up for the portal, we will send you an email to activate the account. This should only take a few minutes.



Click the activation link in the email and create your password to continue.

With your password created, you will need to set up multi-factor authentication. **Enter the mobile phone number you want to use to receive the code. Enter the code and click the 'Verify code' button.**

Once confirmed, you will be directed to the login page, where you can sign in using your email and password for the first time.

Please note that a landline cannot be used for multi-factor authentication.

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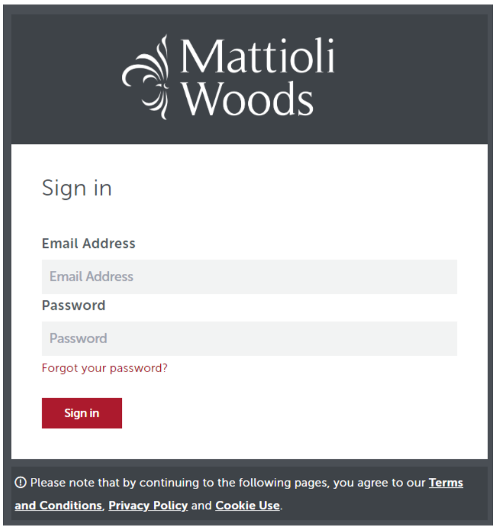
Signing in

Once your account is activated, all you need to do is enter your email address and password, then click ‘Sign in’. You will need to complete the multi-factor authentication upon each login, for security.

You can navigate to the MWPortal using this link:

www.mwportal.mattioliwoods.com

or by going to our website www.mattioliwoods.com and clicking ‘Client login’ then ‘MWPortal’.

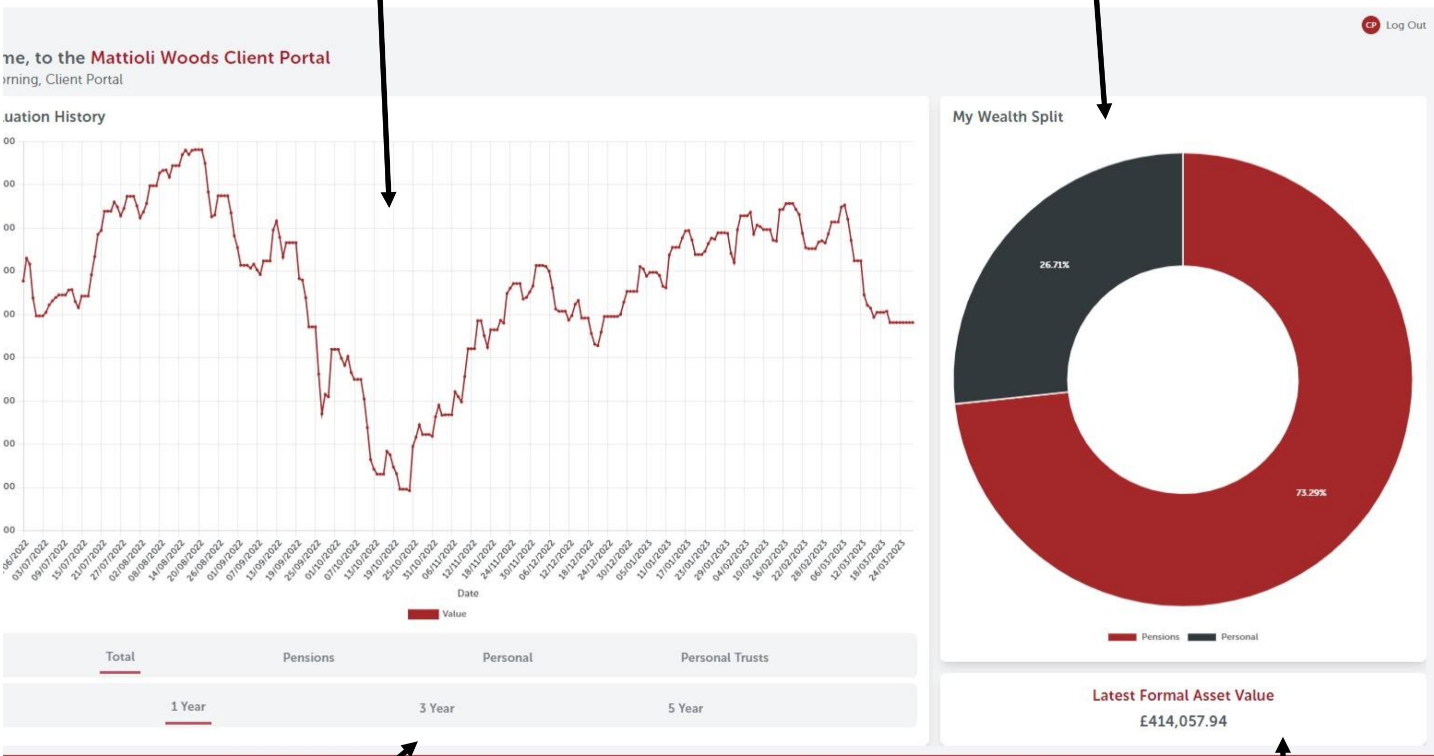


Your dashboard

When you first log in, you will be taken to your dashboard where you can see the headline data for your holdings with Mattioli Woods.

The dashboard performance history graph shows the change in value for your holdings since inception. You can hover over each point on the graph to see the value on that day.

In this graph you will see how much each type of investment makes up your overall portfolio. Hover over each section to see its value.



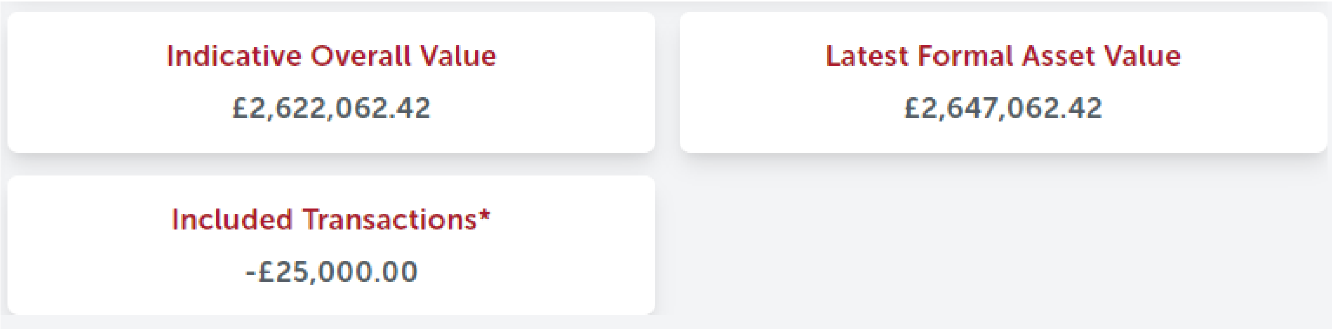
If you have a mix of pension, personal and trust investments, you can toggle between views here to see how each has performed.

Here, the most recent values we have stored for your assets are aggregated to create your total portfolio value with Mattioli Woods.

Included transactions

Many of our pension scheme bank accounts have their balance updated automatically. This means your scheme bank balance may change after making an investment into, or a withdrawal from, an asset.

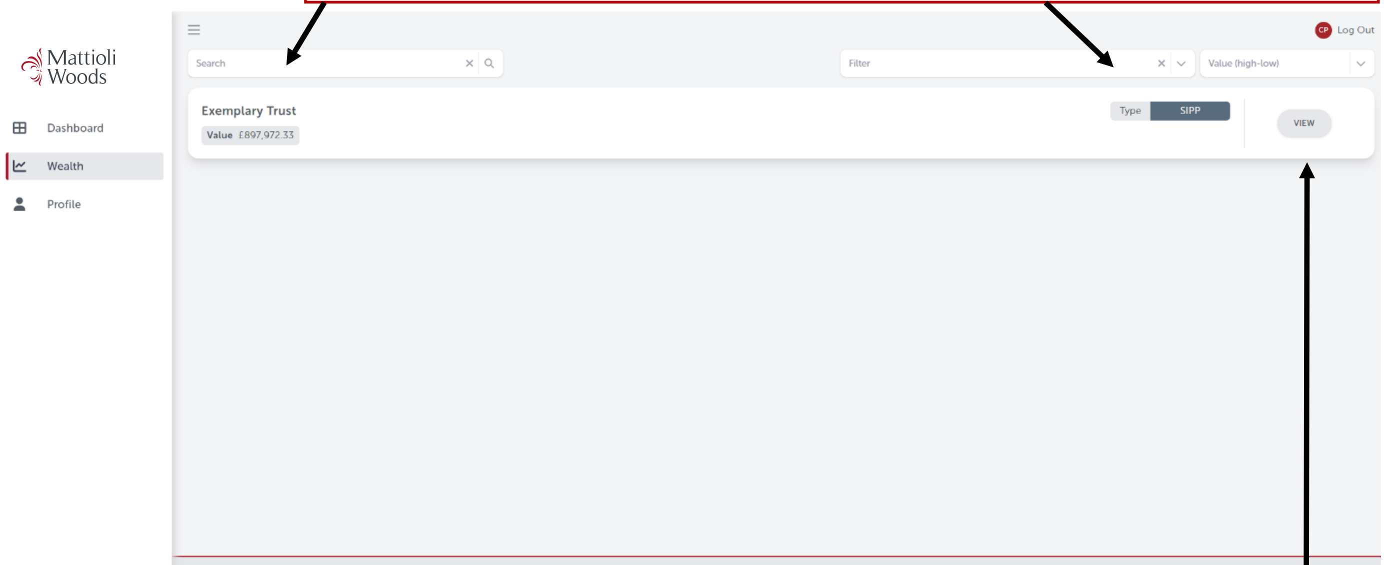
To ensure your performance history and valuation remain accurate, we will add the value of investments and remove the value of withdrawals from relevant portfolios until they are next valued, in line with the transactions from your bank account. We will only do this where the bank account used to make the investment or withdrawal has an automatically updated balance.



Your wealth page

On the wealth page, you can see all the schemes you are a contact for and their values.

You can filter by scheme type, change the sorting order and search with these toolbars.



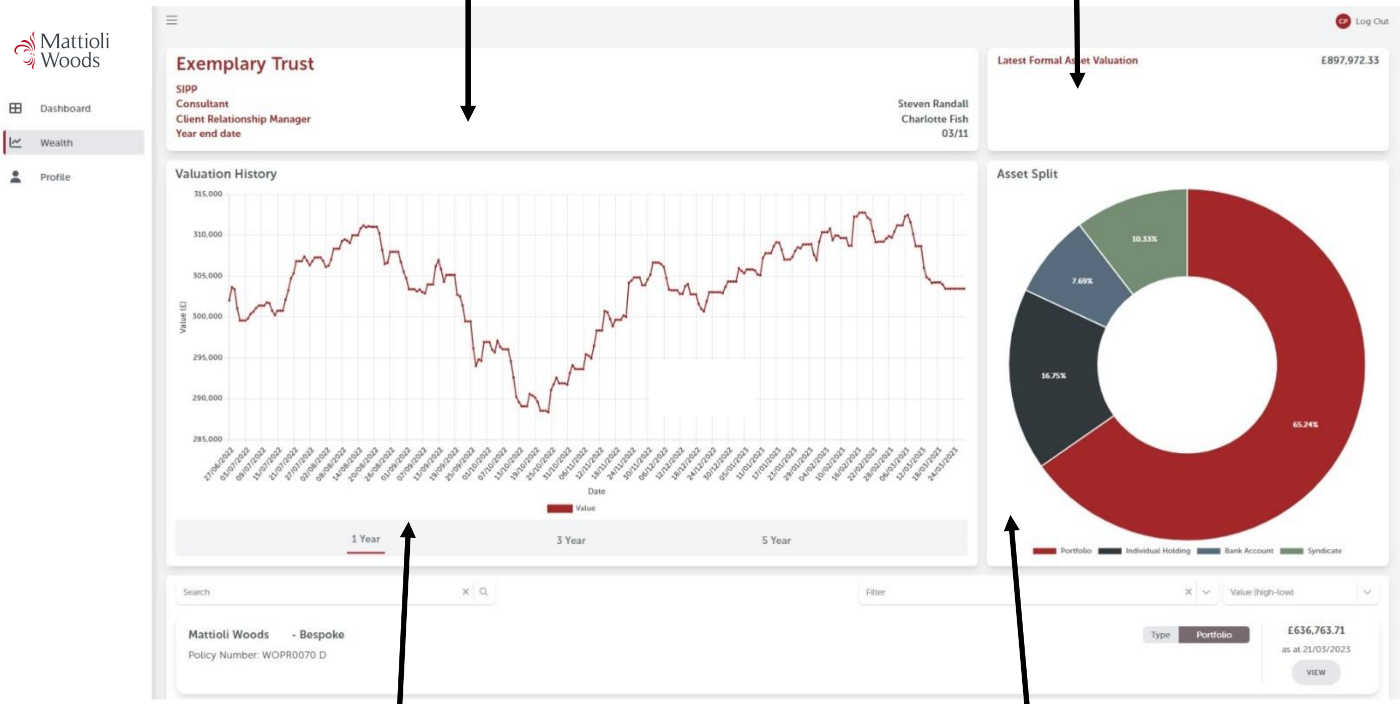
Click ‘View’ to go to the scheme view and see the underlying assets.

Your scheme view

When you click ‘View’ on a scheme, it will take you to the scheme overview. Scrolling down will show the assets held within the scheme.

Here your scheme name, type and contacts are confirmed.

The value of the scheme you have selected will show here. If there are any included transactions, these will also be shown.



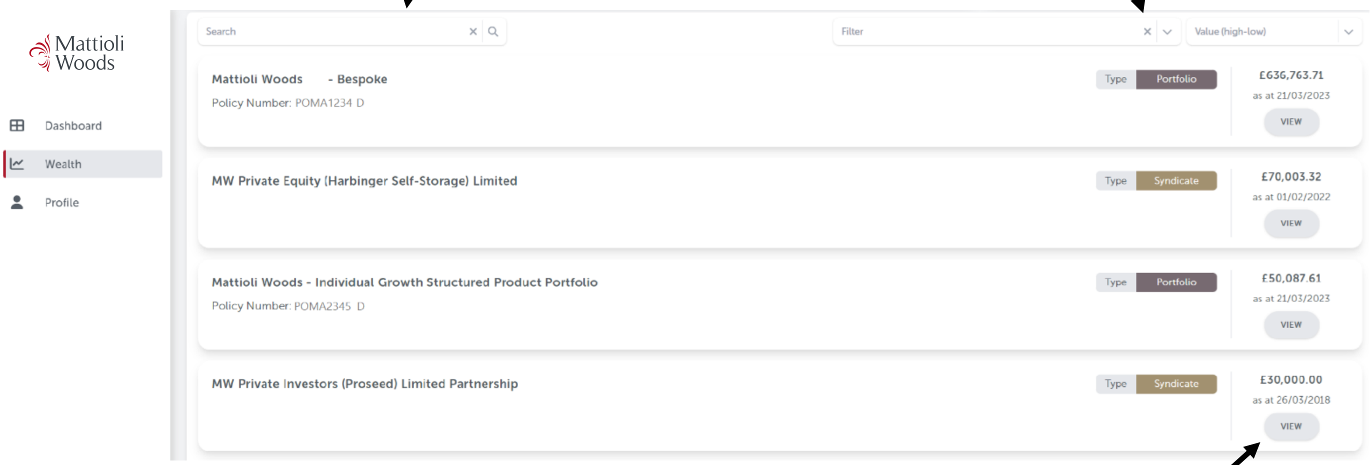
This graph displays the performance of the scheme over the last one, three or five years. Hover over each point to see the value on that date.

This pie chart shows the types of assets that make up the scheme, and how they are split. Hover over a section to see the total value of that type of asset.

Your scheme view – assets

Scrolling down the page from the scheme overview will show you the assets within the scheme. Each line contains the asset type, name, and most recent value.

You can filter the asset type, change the sorting order, and search with these toolbars.



You can click 'View' on certain assets to see more information relating to the asset.

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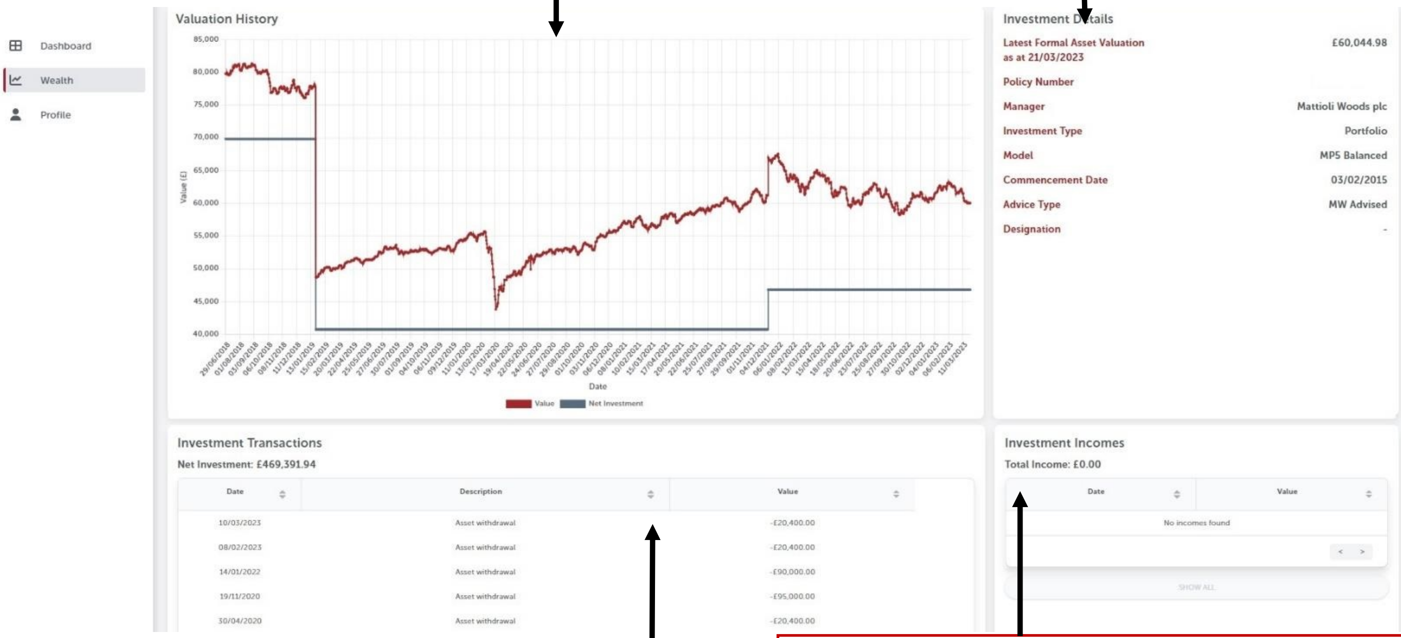
Your asset view

When you click 'View' on a relevant asset, you will be taken to the individual asset view.

This graph shows the net investment and value of the asset since inception. Hover over each point to see the value on that date.

This box contains key details for the asset.



Any income generated by the asset and paid to you or the pension scheme bank account will show here as long as it has been reconciled by your Client Relationship Manager (CRM).

If your asset is a portfolio with underlying holdings, these will be displayed here.

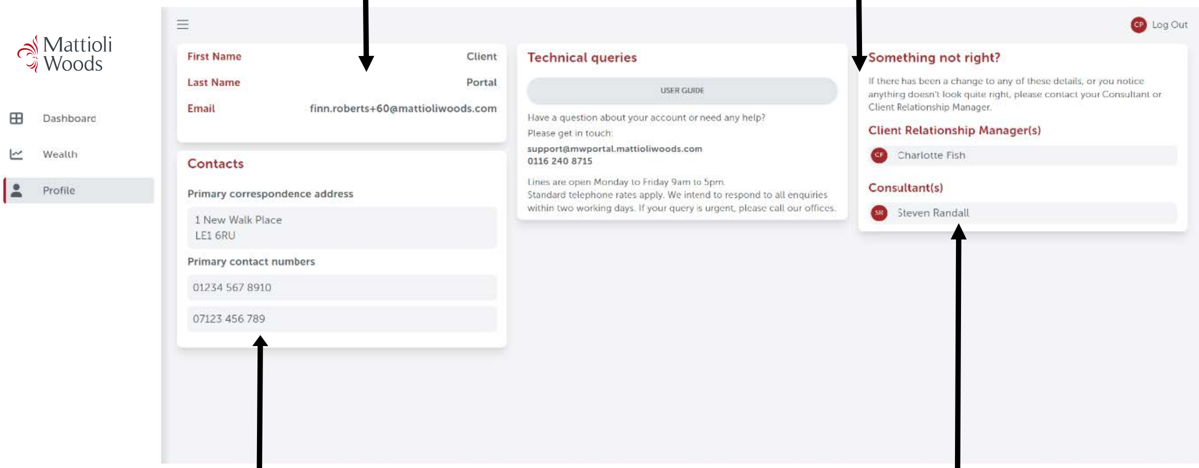
The transactions you have made on the asset will show here.

Your profile page

You can navigate to the profile page using the left-hand sidebar. This page confirms key personal information that we hold on file for you, as well as where you can go for help.

Here your name and the email address that you have registered for the portal are displayed.

For help accessing, navigating, and using the portal, refer to the user guide, or call or email our dedicated support team.



The primary address and contact numbers we hold for you will be shown here.

For information about your investment portfolio, your Mattioli Woods CRM and consultant are best placed to assist.