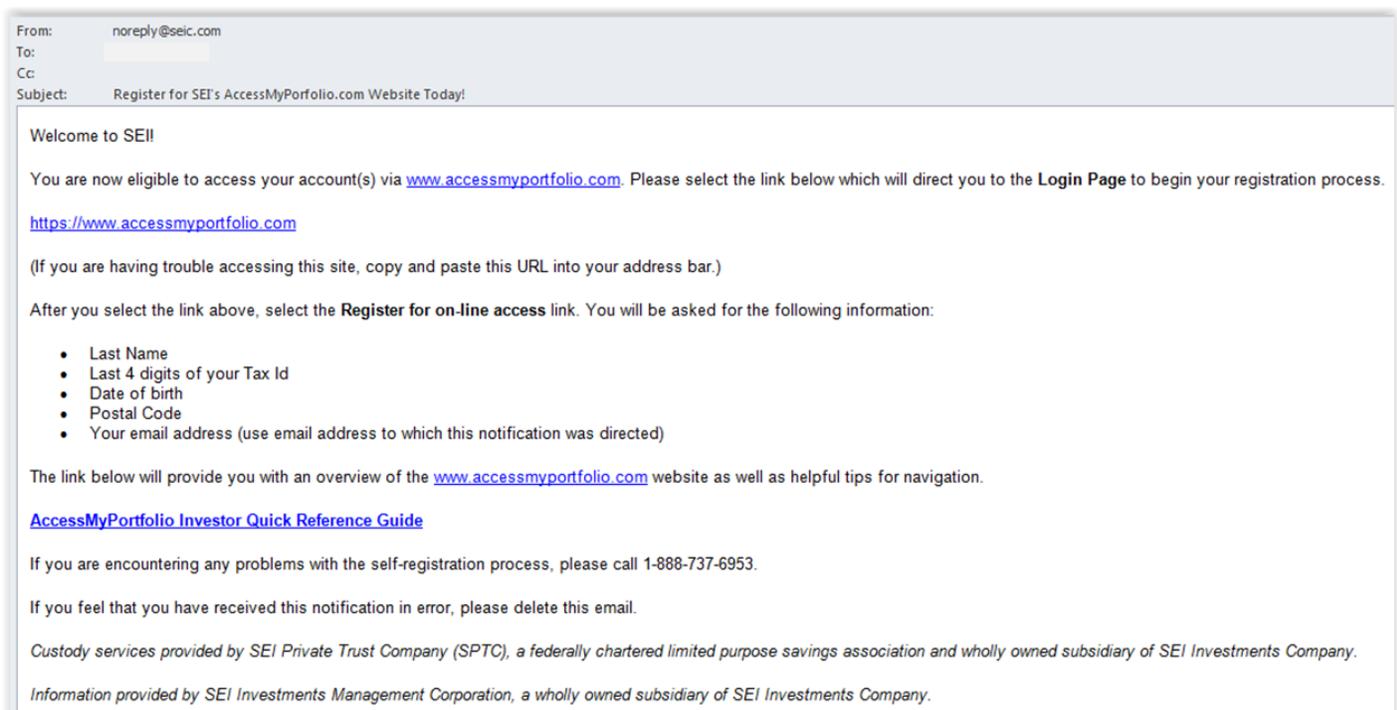


# AccessMyPortfolio.com Self Registration Procedures

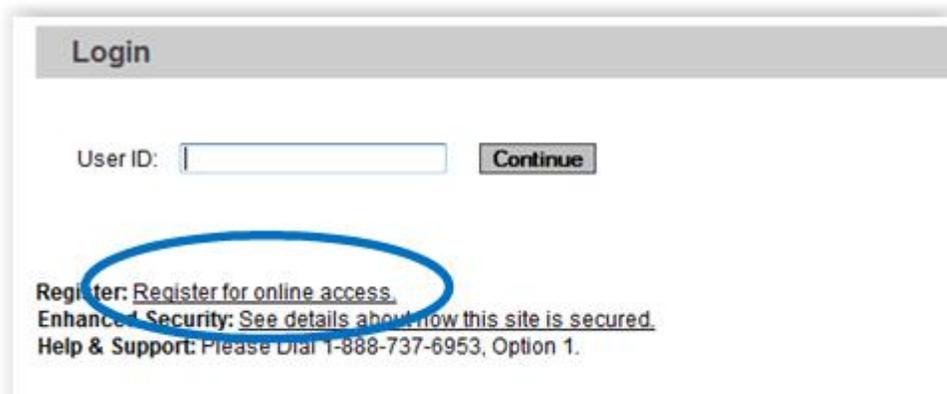
SEI New ways.  
New answers.®

SEI will provide all eligible clients with an automated email advising them that they can proceed with the self-registration process once SEI has received all required client information. Please note that if you are a 3<sup>rd</sup> party to an account and not an account owner you must first contact the account owner and advisor to complete the required AccessMyPortfolio.com form. This form requires the account owner's and/or authorized signor's signature in order to grant access to their account.

1. "Register for SEI's AccessMyPorfolio.com Website" email received.
2. Select link provided within the registration email and you will be directed to [www.accessmyportfolio.com](http://www.accessmyportfolio.com).



3. Select **Register for online access**.



4. Once you have selected the **Register for online access** link, you will be directed to the validation page where you will be required to complete five pieces of personal information and create a user id. Select **Continue**.

**Register for Online Access**

**User Information**

All information is required.

Last Name:

Tax ID:  (Last 4 Digits)

Date of Birth:  (mm/dd/yyyy)

Postal Code:  (First 5 Digits)

Email Address:

Create User ID

User ID:

[Continue >](#)

5. After the information you entered above is validated, you will be presented with your username and password. Please write down your password as it will be needed to complete the self registration process. An automated email will also be generated to the email address indicated below containing your temporary password.

**Register for Online Access**

**User Information**

✓ Your user information has been successfully validated. We have sent you an email with further instructions to complete the Online Access registration.

Please make a note of your Username and Password. You will need this to complete the Login process.

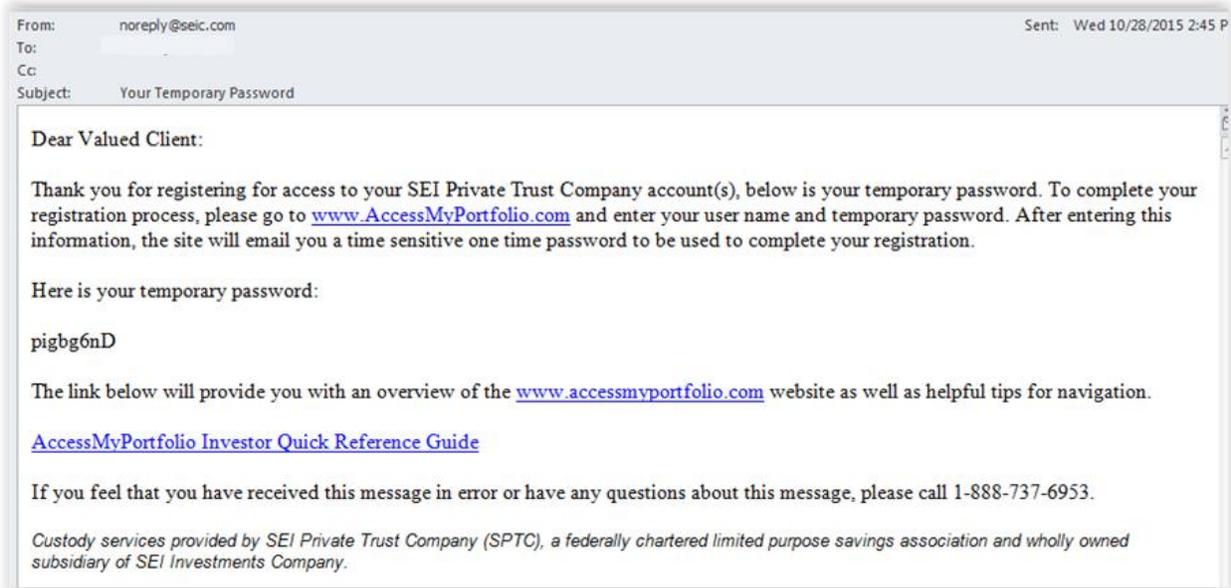
**User Name:** selfregtest1

**Email:** nrambo@seic.com

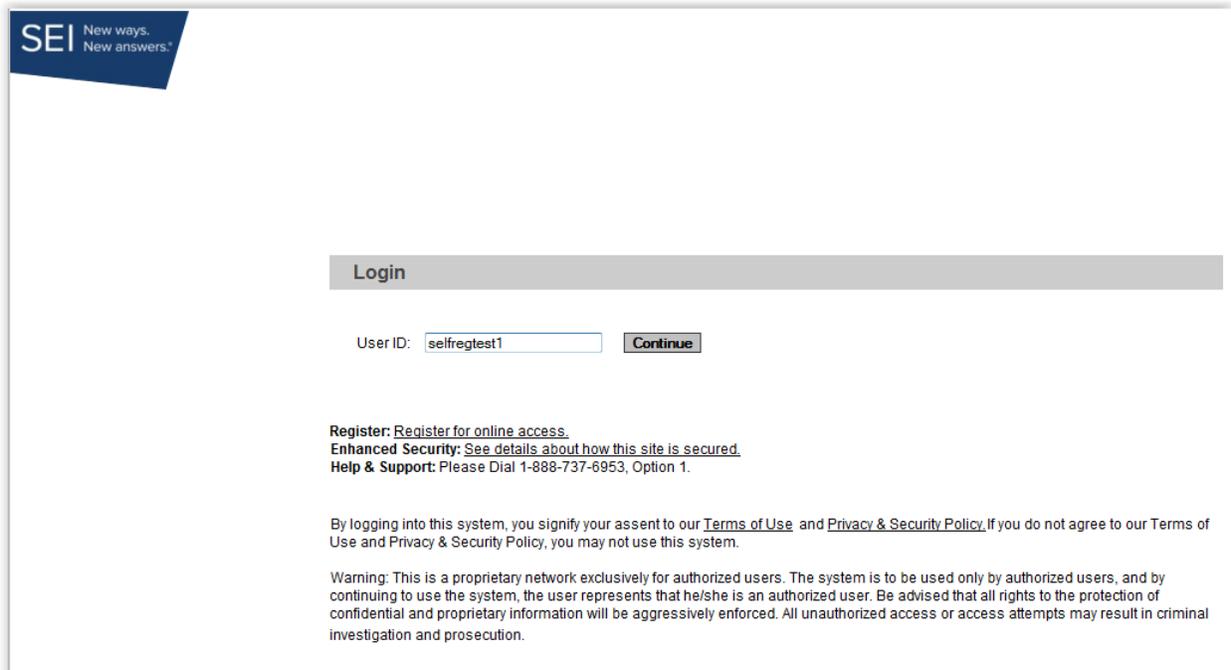
**Password:** pigbg6nD

- Next, navigate to your email account. You will find an email containing your temporary password, instructions on how to complete the registration process and a link to the overview guide with helpful tips for navigation. Within the Temporary Password email, select the [www.accessmyportfolio.com](http://www.accessmyportfolio.com) link provided and you will be directed to AccessMyPortfolio.com website where you will need to enter your username.

### Temporary Password Email:



- Once you have entered your username, select **Continue**.



8. You will then be prompted to **Accept Terms of Use** of the website. If you agree, select the radio button next to **I agree** and select **Continue**.

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**IMPORTANT INFORMATION ABOUT THE NEW LOGIN PROCESS**  
We've changed the way you login to provide even greater security when accessing your account online.

After completing a short enrollment process, you will now see a Personal Assurance Image and Message when entering your Password.

During the enrollment process you will be asked to select a Personal Assurance Image and Message, and provide Answers to Security Questions. After enrollment, when you login with your User ID and we recognize your device, your Personal Assurance Image and Message will be displayed so you'll know immediately that it's safe to enter your Password. If you do not see your Personal Assurance Image and Message, please do not enter your Password.

If we do not recognize your device, we will ask you the Security Questions you answered during enrollment. Once the Security Questions are answered correctly, you will see your Personal Assurance Image and Message. Again, if you do not see your Personal Assurance Image and Message, please do not enter your Password.

By enrolling into this enhanced login process and logging into this system, you signify your assent to the login process and to the Terms and Conditions of Use made available on the prior page. Please enter your password to complete the enrollment process. Please contact your System Administrator if you encounter any problems. Thank you.

I Agree     I Disagree

Password:\*

9. After agreeing to the terms of use, the One Time Password screen will appear notifying you that a One Time Password has been sent to your registered email address.

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**One Time Password**

\* Required

**Welcome selfregtest1**

A One Time Password has been sent to your registered email address.

**Your One Time Password**

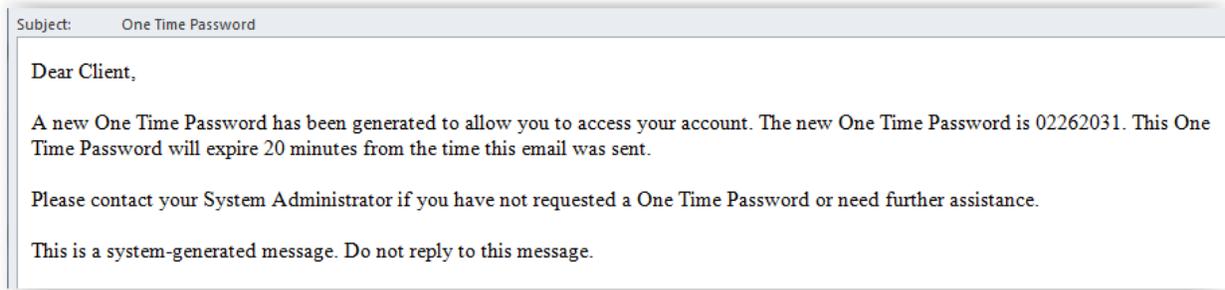
User ID: selfregtest1

One Time Password:\*

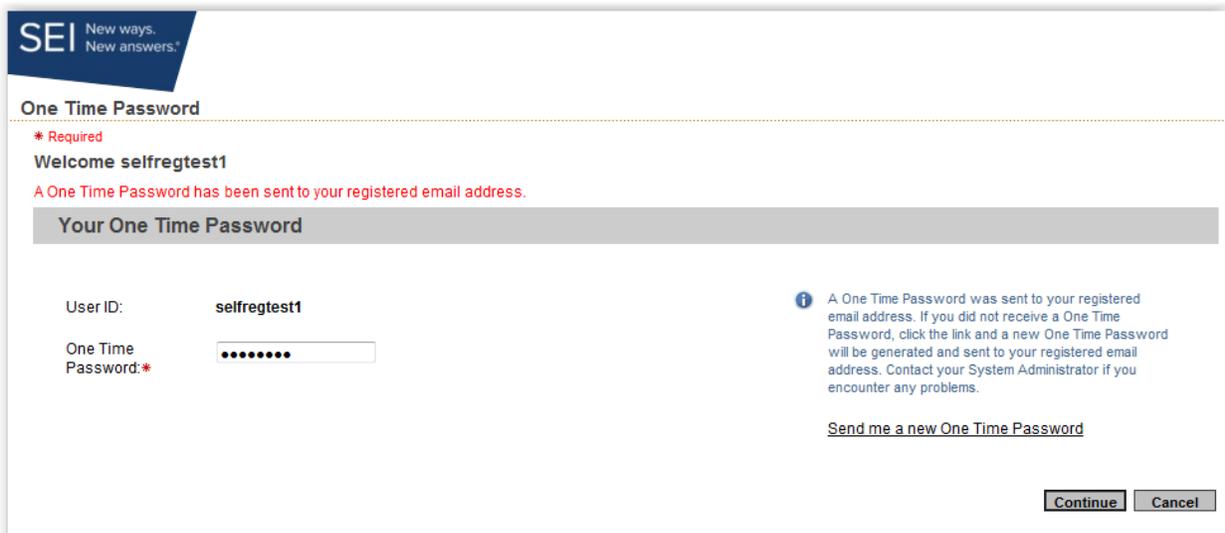
**i** A One Time Password was sent to your registered email address. If you did not receive a One Time Password, click the link and a new One Time Password will be generated and sent to your registered email address. Contact your System Administrator if you encounter any problems.

[Send me a new One Time Password](#)

10. Next, navigate to your email account where you will find your One Time Password. Do not close your browser to access your email account.



11. Once you have located the One Time Password email, copy the password and paste it into the One Time Password field and select **Continue**.



12. Next, you will be prompted to setup your security profile by entering your phone number and selecting a personal assurance message and image. Once you have chosen the information to be displayed, select **Continue**.

Security Profile Setup - Step 1 of 3

\* Required

Welcome selfregtest1

Please provide the following details to enroll.

Your Phone Number may not include alphabetic characters and special characters.

Your Phone Number

Phone Number:\* Mobile

**i** Please enter your phone number, with no hyphens, including your country code. Contact your System Administrator if you encounter any problems.

Your Personal Assurance Image and Message

Personal Assurance Message:\*

**i** Please select your Personal Assurance Message and Image. Your Message must be between 2 and 30 characters. No special characters are permitted. Contact your System Administrator if you encounter any problems.

Personal Assurance Image:\* Plants



Continue Cancel

13. The next step will be to complete five security questions, the answers are case sensitive. These questions will be used to validate your identity anytime you login from an unrecognized computer. Once you have chosen your security questions and answer, select **Continue**.

Security Profile Setup - Step 2 of 3

\* Required

Welcome selfregtest1

Please select your Security Questions and Answers.

Your Security Questions

Question 1:\* What was the name of your elementary / primary school? school

Question 2:\* In what city did you meet your spouse/significant other? other

Question 3:\* What is the name of your favorite childhood friend? friend

Question 4:\* What street did you live on in third grade? grade

Question 5:\* What was the first concert you attended? attended

**i** Security Questions and Answers cannot be repeated. Answers must contain between 2 and 20 characters. No special characters are permitted.

Continue Cancel

14. Finally, you will be prompted to create a new password. The password criteria is displayed on the right-hand side of the screen.

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Security Profile Setup - Step 3 of 3

\* Required

Welcome selfregtest1

Please create and confirm your new Password.

Your Password

Please select your new Password.

- Passwords must be between 8 and 20 characters.
- Passwords must contain at least one number, one upper case character and one lower case character.
- Passwords may have no more than two repeating characters.
- You may not reuse any of your last five Passwords.

Register This Device

Save time. Register this device and skip these Security Questions next time you sign in from this device.

Continue Cancel

15. After you have created new password, there is an option for you to register your computer. Selecting this option will allow you to logon in the future from this computer without being prompted to answer two security questions. Once complete, select **Continue**.

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Security Profile Setup - Step 3 of 3

\* Required

Welcome selfregtest1

Please create and confirm your new Password.

Your Password

Please select your new Password.

- Passwords must be between 8 and 20 characters.
- Passwords must contain at least one number, one upper case character and one lower case character.
- Passwords may have no more than two repeating characters.
- You may not reuse any of your last five Passwords.

Register This Device

Save time. Register this device and skip these Security Questions next time you sign in from this device.

Continue Cancel

**This completes the Self Registration Process for  
AccessMyPortfolio.com**