

# JM FINN

Investment | Wealth



# JM Finn Portal Guide

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User guide for your JM Finn online account

## Welcome to the JM Finn client portal

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

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## Register (accessing for the first time)

If you are not currently registered for online access please contact your Investment Manager to arrange this. Once you have received your login details then navigate to your preferred web browser and then to [www.jmfinn.com](http://www.jmfinn.com). Then click on the login button on the top right of the screen. Enter your username (the party number) and password and click the Login button.

You will be asked to input three specified digits of your PIN. This is the 6 digit PIN that was sent to your registered postal address with your username.

You will then be prompted to change your temporary password. This should be changed to something memorable to you that has between 8 and 15 characters with letters and numbers. No special characters are required. Please memorise this password – we recommend that you do not write it down.

### Change password

For security reasons we require you to change your password. Please enter new password and confirm password below.

When changing your password, the new password must meet the following criteria:

- Minimum number of characters: 7
- Maximum number of characters: 15
- Contain at least one upper case character
- Contain at least one lower case character
- Contain at least one number

Please create a password

Enter password

Please confirm your password

Enter password

Next

You will then be prompted to change your temporary PIN. This should be changed to something memorable to you that is 6 numbers. Please memorise this PIN – we recommend that you do not write it down.

### Change PIN

For security reasons we require you to change your PIN and securely retain this for your records. Your new PIN must meet the following criteria:

- Cannot use the same digit more than 2 times consecutively - e.g. 111222 or 123888
- Cannot consist entirely of sequential digits - e.g. 123456 or 876543

Confirm new PIN

1

2

3

4

5

6

7

8

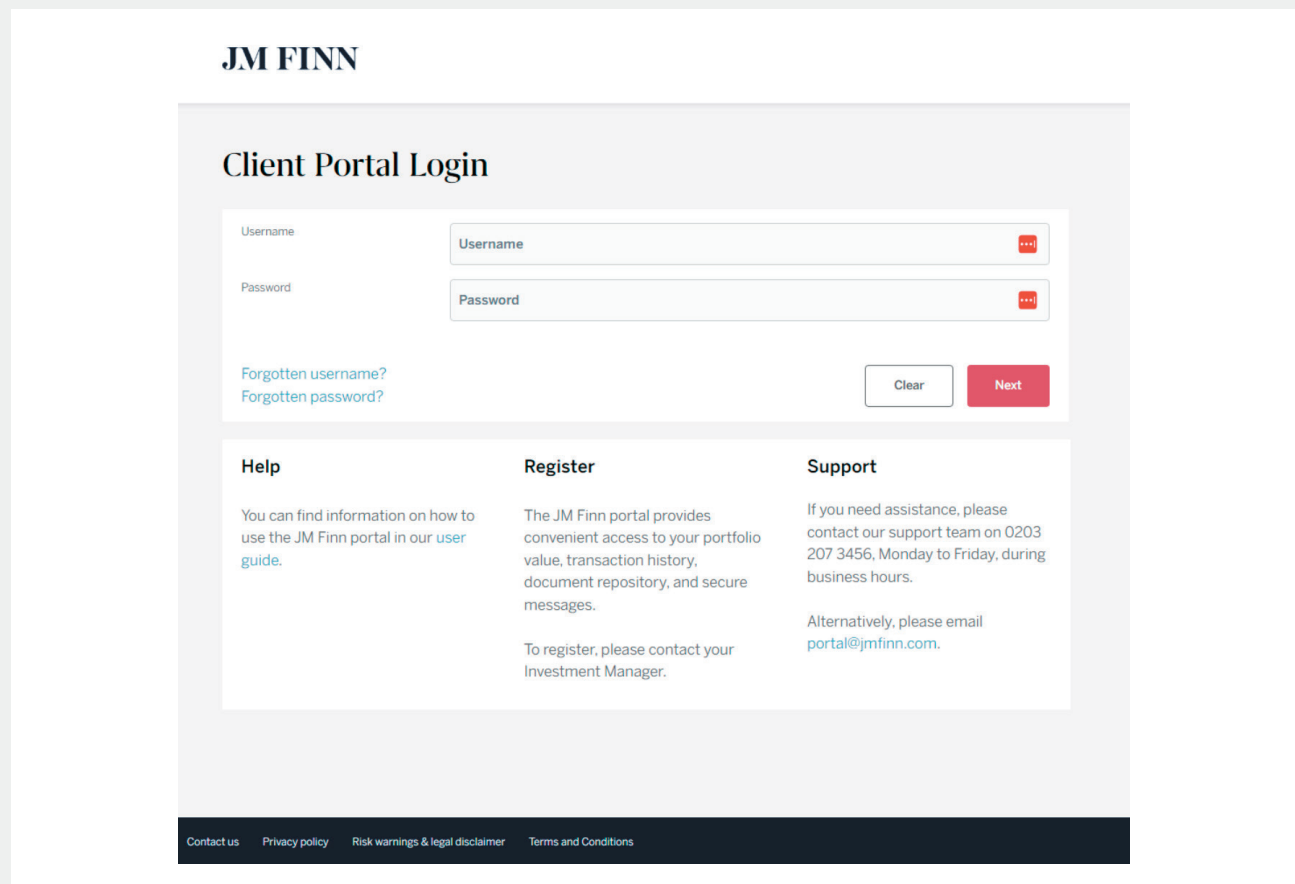
9

0

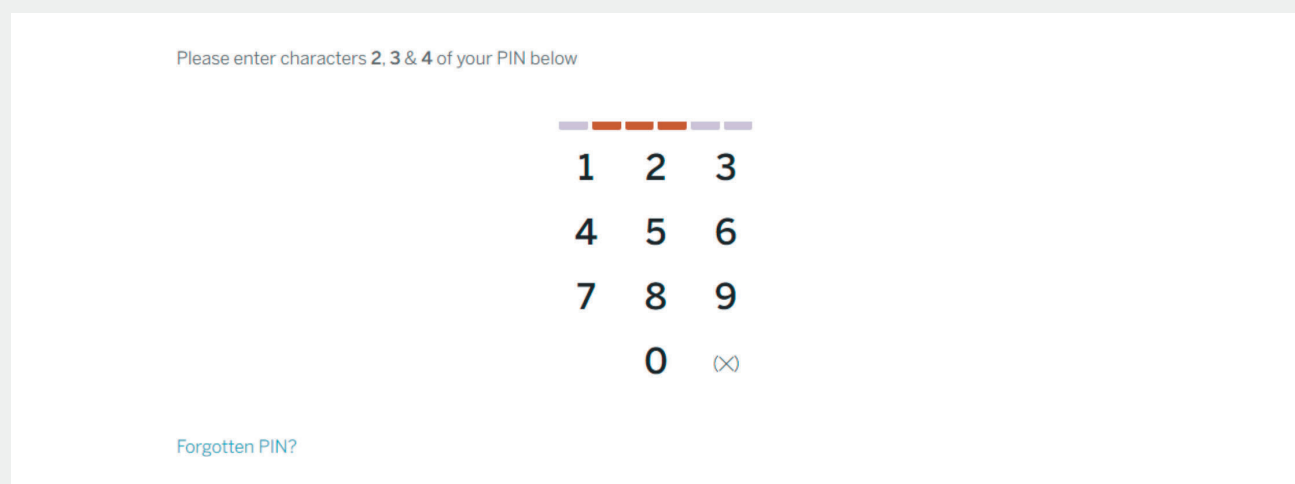
(X)

## Login (accessing after you have already logged in once)

To login to the JM Finn Portal you will need your Username, Password and PIN. Should you require any assistance with this information, please do not hesitate to contact us.



The screenshot shows the JM Finn Client Portal Login interface. At the top, the JM FINN logo is displayed. Below it, the heading 'Client Portal Login' is centered. The login form consists of two input fields: 'Username' and 'Password', each with a red eye icon for toggling visibility. Below the password field, there are links for 'Forgotten username?' and 'Forgotten password?'. To the right of these links are two buttons: 'Clear' and 'Next'. Below the login form, there are three columns of text: 'Help' (linking to a user guide), 'Register' (explaining the portal's benefits and providing a contact point for registration), and 'Support' (providing contact details for the support team and an email address). At the bottom of the page, there is a dark footer bar with links for 'Contact us', 'Privacy policy', 'Risk warnings & legal disclaimer', and 'Terms and Conditions'.



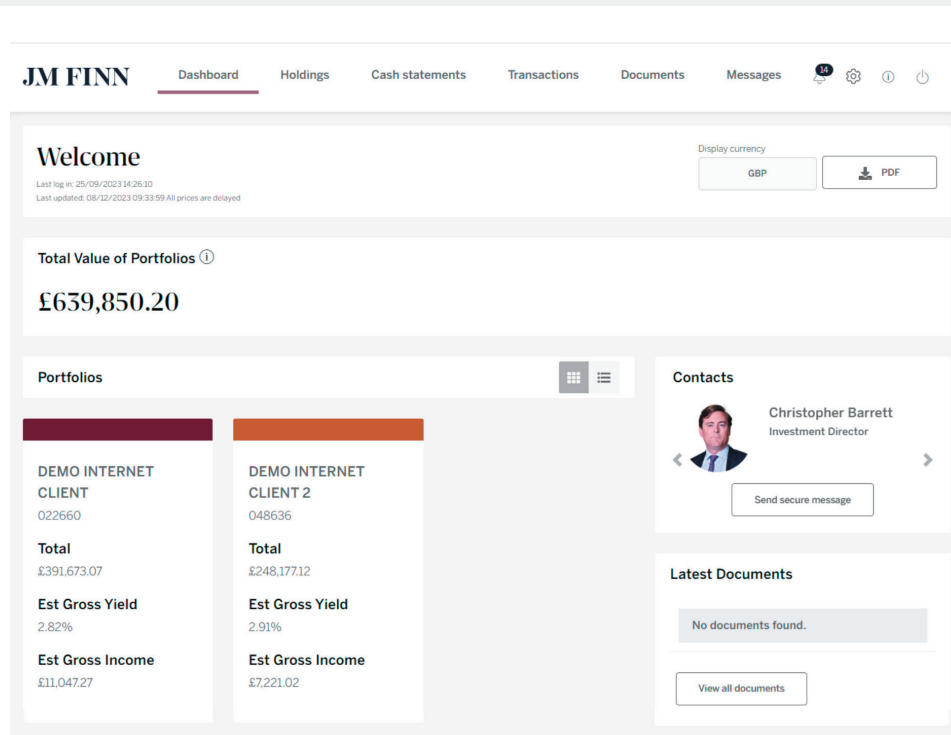
The screenshot shows the PIN input screen. At the top, it says 'Please enter characters 2, 3 & 4 of your PIN below'. Below this, there are four colored bars (orange, orange, orange, grey) representing the digits of the PIN. A numeric keypad is displayed below the bars, with digits 1 through 9, 0, and a backspace icon (X). At the bottom left, there is a link for 'Forgotten PIN?'.

Using your preferred web browser, navigate to the JM Finn website at [www.jmfinn.com](http://www.jmfinn.com) and click on the login button on the top right of the screen. Enter your username and password and click the Login button.

You will be asked to input three specified digits of your PIN. This is the 6 digit PIN that was sent to your registered postal address with your username.

## Dashboard

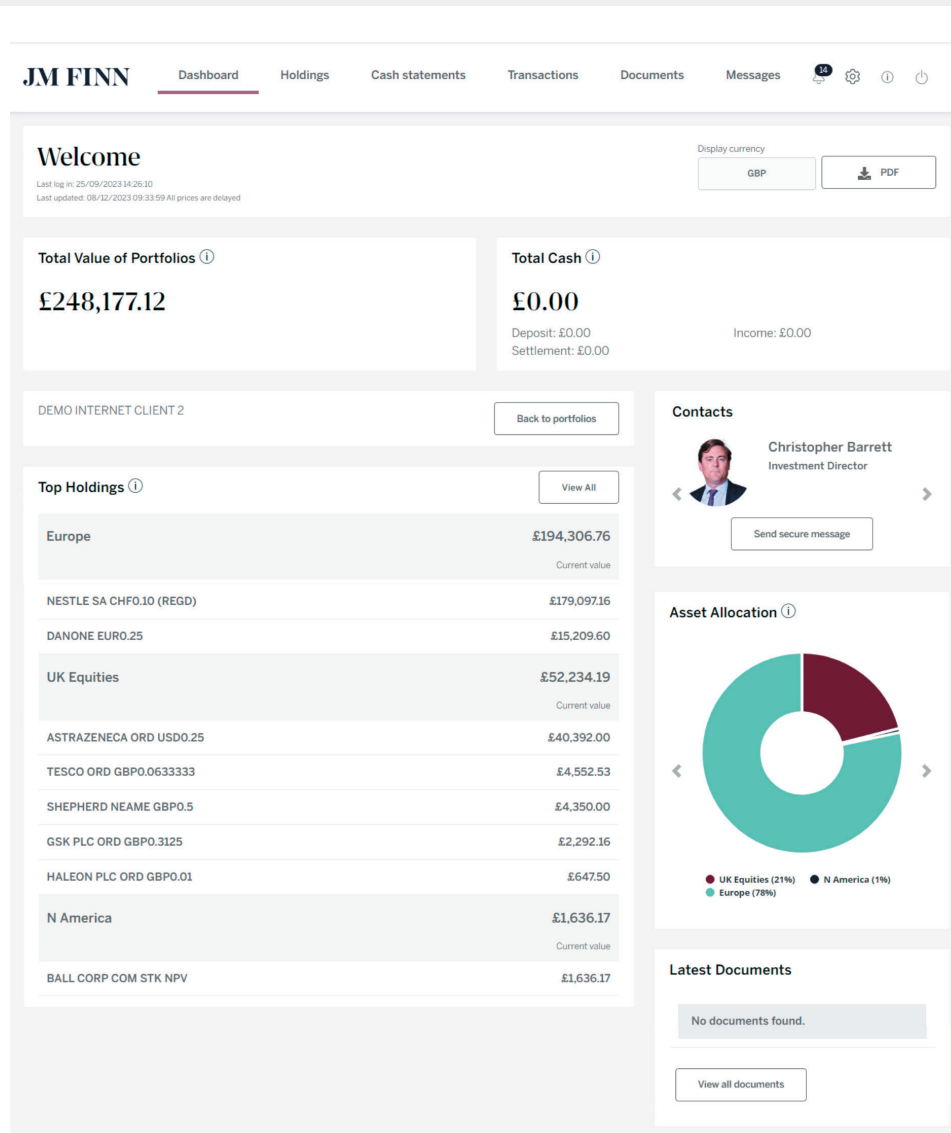
When logging in to the Portal the first page you get to is the Dashboard. Here you can see a summary of your portfolio totals, your top 10 holdings and links to your latest documents.



The screenshot displays the JM Finn Dashboard. At the top is a navigation bar with the JM Finn logo and links to Dashboard, Holdings, Cash statements, Transactions, Documents, Messages, and user settings. The main content area features a 'Welcome' message with login details and a 'Display currency' dropdown set to GBP. Below this, the 'Total Value of Portfolios' is shown as £639,850.20. The 'Portfolios' section contains two cards for 'DEMO INTERNET CLIENT' and 'DEMO INTERNET CLIENT 2', each showing Total, Est Gross Yield, and Est Gross Income. To the right, the 'Contacts' section shows a profile for Christopher Barrett, Investment Director, with a 'Send secure message' button. The 'Latest Documents' section at the bottom right indicates 'No documents found.' with a 'View all documents' button.

Portfolio	Total	Est Gross Yield	Est Gross Income
DEMO INTERNET CLIENT 022660	£391,673.07	2.82%	£11,047.27
DEMO INTERNET CLIENT 2 048636	£248,177.12	2.91%	£7,221.02

By clicking on one of your accounts, you can see the portfolio breakdown, asset allocation and top holdings for that account, as well as your latest documents.



- A** The asset allocation wheel is interactive, allowing you to click on the different segments to view a breakdown of the asset types within that sector.

# Holdings

The Holdings page gives a full overview of your portfolios and provides a list of all the Holdings in all of the portfolios you have the ability to view. You can download this as a spreadsheet or PDF.

JM FINN

DashboardHoldingsCash statementsTransactionsDocumentsMessages

Holdings search

Portfolio picker

Currency selector

Search instrument name, ISIN or SEDOL

All Portfolios

GBP

Account Summary

Account name	Account number	Type	Total	Income	Yield
DEMO INTERNET CLIENT	022660INT	Internal	£391,583.48	£11,047.27	2.82%
DEMO INTERNET CLIENT 2	048636INT	Internal	£248,177.12	£7,221.02	2.91%

Asset allocation

(100.00%) Investment

Group by:

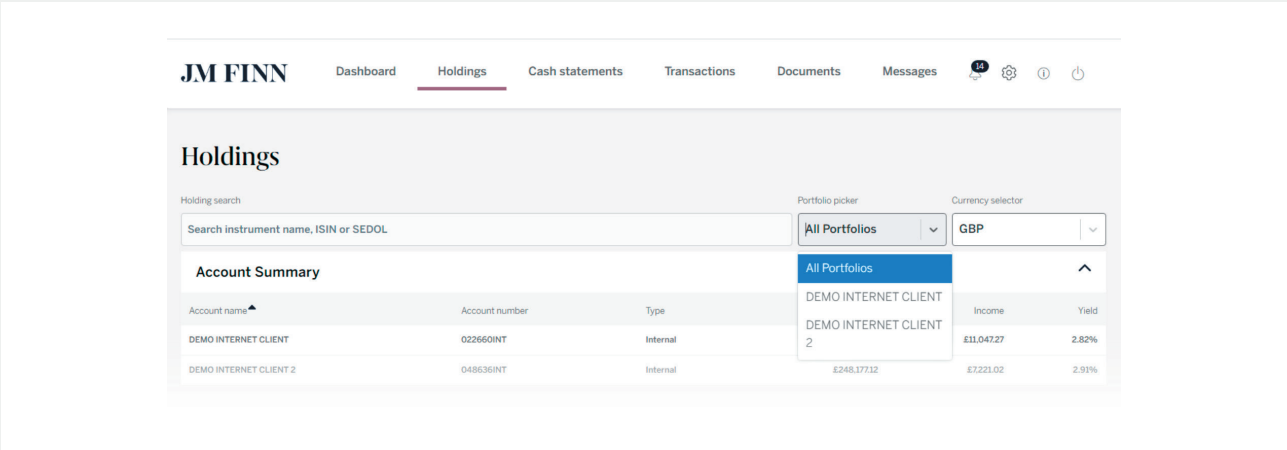
Holding Type

Holdings

CSVPDF

Description	Quantity	Price	Current value	Book cost	Gain/Loss	Income	Yield	%	Account
Investment									
ABRDN OEIC V GBL INFLATI...	4,500.00	£1.332	£5,994.00	£8,068.31	£2,074.31	£299.27	4.99%	0.94%	022660INT
ARTEMIS FUND MANAGERS ...	22,200.00	£0.5002	£11,104.44	£12,302.19	£1,197.75	£501.43	4.52%	1.74%	022660INT
ASTRAZENECA ORD USD0.25	400.00	£100.98	£40,392.00	£2,000.00	£38,392.00	£938.40	2.32%	6.31%	048636INT
BALL CORP COM STK NPV	36.00	\$57.21	£1,636.17	£762.92	£873.25	£22.88	1.40%	0.26%	048636INT
BELLEVUE HEALTHCARE TR...	6,600.00	£1.362	£8,989.20	£12,252.31	£3,263.11	£395.34	4.40%	1.40%	022660INT
BLUEFIELD SOLAR INCOME ...	8,700.00	£1.142	£9,935.40	£11,891.24	£1,955.84	£748.20	7.53%	1.55%	022660INT
CG PORTFOLIO FUND PLC T...	40.00	£157.54	£6,301.60	£6,127.27	£174.33	£118.40	1.88%	0.98%	022660INT
DANONE EURO.25	300.00	€59.14	£15,209.60	£10,000.00	£5,209.60	£514.36	3.38%	2.38%	048636INT
DIAGEO ORD GBPO.28 101/L...	300.00	£27.62	£8,286.00	£5,796.00	£2,490.00	£240.00	2.90%	1.29%	022660INT
FERGUSON PLC ORD GBPO.10	90.00	£140.40	£12,636.00	£8,514.13	£4,121.87	£217.36	1.72%	1.97%	022660INT
FUNDSMITH EQUITY FUND E...	5,400.00	£5.7206	£30,891.24	£8,438.54	£22,452.70	£90.97	0.29%	4.83%	022660INT
GENUS ORD GBPO.10	110.00	£20.48	£2,252.80	£3,936.99	£1,684.19	£35.20	1.56%	0.35%	022660INT
GREENCOAT UK WIND PLC ...	4,000.00	£1.44	£5,760.00	£5,848.74	£88.74	£400.00	6.94%	0.90%	022660INT
GSK PLC ORD GBPO.3125	160.00	£14.326	£2,292.16	£8,140.08	£5,847.92	£90.40	3.94%	0.36%	048636INT
HALEON PLC ORD GBPO.01	200.00	£3.2375	£647.50	£1,859.92	£1,212.42	£8.40	1.30%	0.10%	048636INT
JPMORGAN AMERICAN INV...	1,950.00	£8.17	£15,931.50	£11,991.37	£3,940.13	£141.37	0.89%	2.49%	022660INT

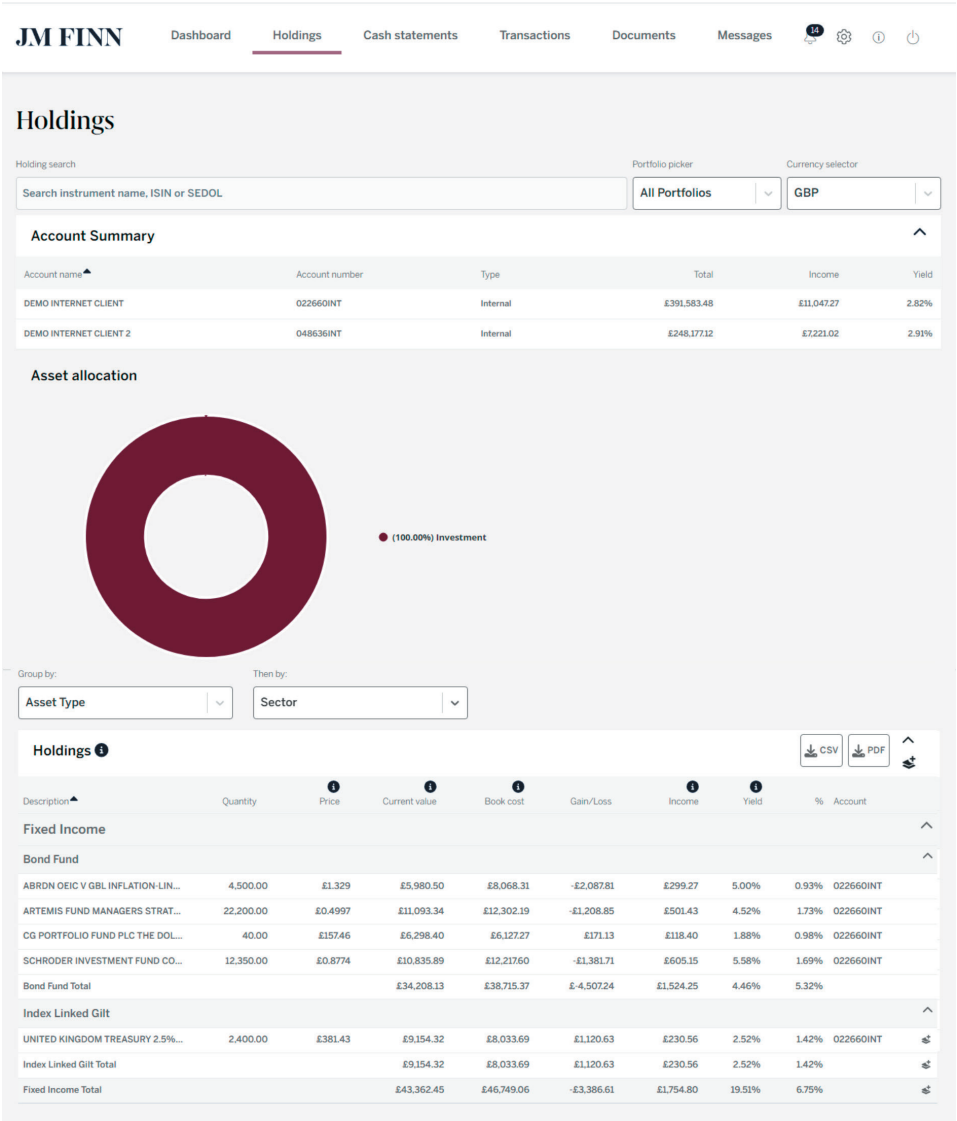
The portfolio picker allows you to drill down to view individual portfolios. This feature will amend the whole page to show only assets and holdings of that particular portfolio.





# Grouping Holdings

Your portfolio holdings will initially be grouped by “Holding Type”, which simply separates Investments from Cash. However, if preferred, you can choose to group by “Asset Type”, and then optionally by “Sector”.



## Cash Statements

The cash statement allows you to view all cash statements dating back 2 years.

**Cash statements**

Last updated: 01/02/2023 04:44:48  
All prices are delayed

**Filter by Date**

One day Last month Last 6 months Last 12 months Year to date Custom

Date from: Date to: [Search]

**Actions**

Export Currency: GBP Account type: All Account Picker: DEMO INTERNET CLIENT 022660INT

Trade date	Settlement date	Description	Currency	Debits	Credits	Balance
01 Feb 2023	01 Feb 2023	Closing Balance	GBP			£16,447.32
31 Jan 2023	31 Jan 2023	Interest paid on CR bal to 31/01/23 Income Account	GBP		£57.07	£16,447.32

- C** You can filter by the suggested periods or with a custom date. This data can be downloaded to a spreadsheet using the Export button.

## Transactions

The Transaction view allows you to view all transactions dating back 2 years.

**Transactions**

Last updated: 01/02/2023 04:44:48  
All prices are delayed

**Filter by Date**

One day Last 3 months Last 6 months Last 12 months Custom

Date from: Date to: [Search]

**Actions**

Export All Buy Sell All selected (2)

Date	Account Number	Type	Description	Currency code	Price	Proceeds/Costs
16 Aug 2022	087471GEN	Buy	SVS KENNOX STRATEGIC VALUE FUND A INC NAV	GBP	1.288	£11,934.00
15 Aug 2022	087471GEN	Sell	CG PORTFOLIO FUND PLC DOLLAR HEDGED GBP INC	GBP	101.71	£12,693.75

- D** You can filter by the suggested periods or with a custom date. This data can be downloaded to a spreadsheet using the Export button.

# Documents

Documents are stored on the Portal for 3 years. You can filter them by date or by document type, as well as by portfolio and by their read status. We advise clients to download the documents you wish to keep.

Filter by Date

One day

Last month

Last 6 months

Last 12 months

ALL

Custom

Date from

Date to

Date from

Date to

Filter documents

All

Contract Notes

Cost Disclosure

Custody Statements

Depreciation Reports

Historic Attachments

Invoices

Other

Statements

Tax Reports

Valuations

Wealth Planner

Portfolio

Choose portfolio

Choose portfolio

DEMO INTERNET CLIENT

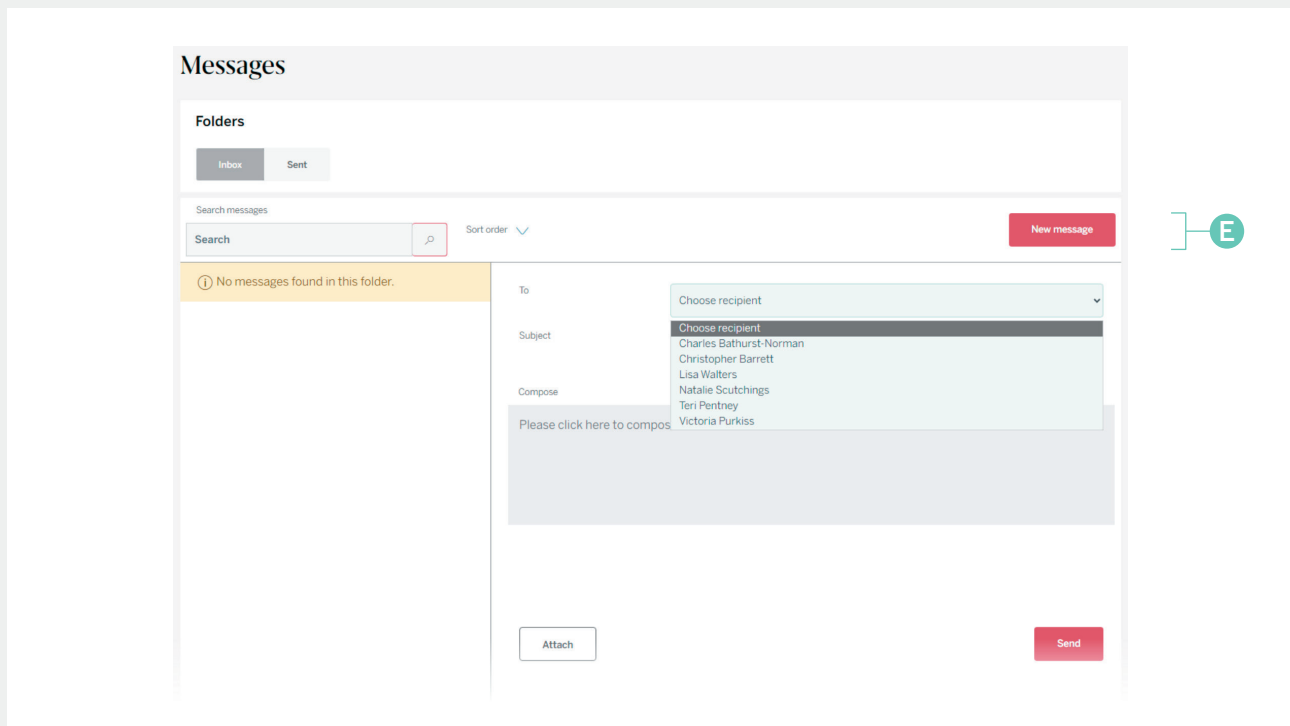
DEMO INTERNET CLIENT 2

Unread only

		Name	Date	Read
.PDF	DEMO INTERNET CLIENT	Custody Statements Custody (250120231341220640) January 2023	25/01/2023	New
.PDF	DEMO INTERNET CLIENT 2	Custody Statements Custody (050120230904014780) January 2023	05/01/2023	New
.PDF	DEMO INTERNET CLIENT	Custody Statements Custody (050120230904006660) January 2023	05/01/2023	New

## Secure Messages

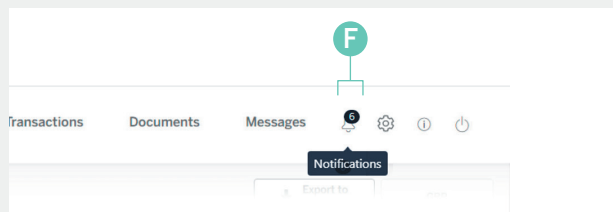
Here you are able to send messages to your Investment Manager and their team. In the interests of reducing the chances of account documentation being intercepted, we have developed a secure messaging function for two-way messages between you and your investment managers. This eliminates the need to send documents as attachments by email, which is highly susceptible to hacking.



- E** After clicking “New Message” you will be able to select a recipient, enter a subject and type your message. The contacts you see is based on your Investment Manager and their team.

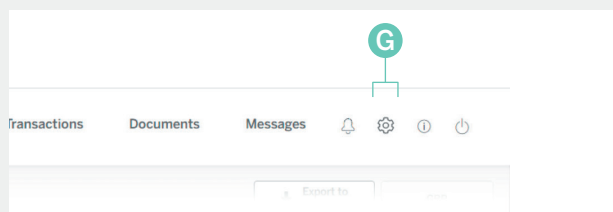
## Personal Library Notifications

- F** At the top of each page there is the bell icon. These are your notifications advising how many new documents are waiting for you in the Personal Library.



## Settings

- G** At the top of each page there is the Settings wheel. Clicking this will take you to the Settings page. Here you are able to reset your Security Questions, change your Password and PIN and update other security settings under your Profile.



### Reset security questions

In order to reset your security questions please click the below button. For security reasons once you have saved your security questions you won't be able to view them.

Reset security questions

### Change password

When changing your password, the new password must meet the following criteria:

- Minimum number of characters: 7
- Maximum number of characters: 15
- Contain at least one upper case character
- Contain at least one lower case character
- Contain at least one number

Current password

Enter current password

Please create a password

Enter password

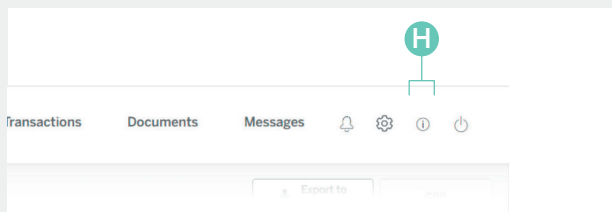
Please confirm your password

Enter password

Change password

## Accessing more Information

**H** Clicking on the information icon will allow you to navigate to a new page. This page will contain our FAQs, JM Finn Bank Details and information on how to raise a Fraud Alert with us.



The FAQs will show a list of frequently asked questions relating to the Portal, such as if there is a mobile app and details regarding security features.

The Bank Details will show JM Finn's Bank Details that can be used in order to transfer money to be used for your portfolios.


Fraud Alert allows you to raise a concern should you feel there is any security threat to your account. To do this, please complete the form which will alert our IT team. They will inform your Investment Manager who will follow up with you to discuss next steps such as locking the account or resetting your details.

[Fraud Alert](#)
[F.A.Q. & User Guide](#)
[Bank Details](#)

FRAUD ALERT

If you feel you have been the victim of a cyber-attack or your account has been hacked, JM Finn have the ability to automatically freeze your on-line access to the portal as a temporary measure.

If you wish your cash and dealing accounts at JM Finn to be restricted in any way, please contact your Investment Manager who can arrange this.

☐ I'm not a robot
 

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## FAQs

### **Is there a Mobile App available?**

Yes, the JM Finn Portal app can be downloaded from your device's app store.

The app is reflective of the data on the website and is adaptive to the size of the device you are using.

### **Does the Portal support two-factor security?**

Two factor security is available on the mobile app for those devices that support biometric – fingerprint or facial recognition. The website has two-factor capability and will be switched on in the near future.

### **What Internet Browser or Program is the Portal supported on?**

The Portal will function on PCs and Macs using Microsoft Edge, Google Chrome, Firefox and Safari. The Portal will not work on Internet Explorer due to outdated support by Microsoft which is a risk to security.

### **Are there any web browsers that do not support the JM Finn portal?**

Yes, we currently do not support Safari on mac products that are running High Sierra (the fourteenth major release of macOS).

### **Can I change my security questions, password and pin in the portal?**

Yes, these can all be edited in the portal, under Settings.

## JM Finn's Client Portal

### Features

Available on your desktop computer, laptop or download our app by searching "JM Finn" on Google Play or the App Store

Secure log-in from your smart phone or tablet (if available) via biometric identity check

View, download and print all your account documentation for the last 3 years from your personal library

View, download and print the current value of your portfolio

Drill down to view the asset distribution across your portfolios

View a consolidated holdings report, by family group or by individual portfolio

Send and receive secure messages with your Investment Manager or representative

Personal alerts when new documents are posted to your personal library

Access transaction statement and cash statement

View the portal via the app.  
Available at:



Follow us on:



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info@jmfinn.com  
[www.jmfinn.com](http://www.jmfinn.com)

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