

Investment | Wealth

JM FINN

Client Portal Login

Welcome to JM Finn's new Portal

JM Finn **Portal Guide**

User guide for your JM Finn online account

Self-registration process (accessing for the first time)

To get started with using the client portal, first you need to set your account up online. The process is quick and easy - below is a screen-by-screen guide for the process. If you need any help at any stage, please contact your Investment Manager for assistance.

First click the 'here' button in the setup function on the client portal login.

Username Username Image: Constraint of the service	M FINN		
Username Image: Clear Password Image: Clear Forgotten username? Next Forgotten password? Image: Clear Help Setup Next You can find information on how to use the JM Finn portal provides convenient access to your portfolio value, transaction history, document repository, and secure messages. If you need assistance, please contact your Investment Management team. Alternatively, please email portal@jmfinn.com. Please click(ner) to activate your	Client Portal Log	gin	
Password Image: Clear Next Forgotten username? Clear Next Forgotten password? Setup Next Help Setup Support You can find information on how to use the JM Finn portal provides convenient access to your portfolio value, transaction history, document repository, and secure messages. If you need assistance, please contact your Investment Management team. Alternatively, please email portal@jmfinn.com. Please click(nere) to activate your	Username	Username	
Forgotten password? Clear Next Help Setup Support You can find information on how to use the JM Finn portal in our user guide. The JM Finn portal provides convenient access to your portfolio value, transaction history, document repository, and secure messages. If you need assistance, please contact your Investment Management team. Alternatively, please email portal@jmfinn.com. Please click(here) to activate your	Password	Password	
You can find information on how to use the JM Finn portal in our user guide. The JM Finn portal provides convenient access to your portfolio value, transaction history, document repository, and secure messages. Please click here to activate your			Clear Next
use the JM Finn portal in our user guide.	Help	Setup	Support
	use the JM Finn portal in our us	ser convenient access to your port value, transaction history, document repository, and sect messages. Please click here to activate yo	tfolio contact your Investment Management team. ure Alternatively, please email portal@jmfinn.com.

You will be taken to the activation page, please enter your email address.

IM FINN						
Activation						
Please confirm your email addre	se confirm your email address:					
Email address	Enter email address		••••			
			Next			

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Self-registration process (accessing for the first time)

Please enter your details to verify your identification.

Activation		
Email address	Enter email address	
Please verify your identity b	y confirming 3 details below:	
Surname	Enter surname	
Date of birth	Enter date of birth DD/MM/YYYY	
National insurance number	Enter national insurance number	
		Ne

Select a username and password.

JM FINN		
Activation		
Please enter your chosen u	sername and password below:	
Please enter your username	Enter username	
Please create a password	Enter password	•
Please confirm your password	Enter password	•
	 I agree to the terms and conditions. Please agree to terms and conditions 	
		Next

Choose PIN.

JM FINN Activation In order to access the site, you will require a six-digit PIN in addition to your username and password. Please enter your chosen PIN below, click "Change 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 Enter new PIN 1 2 3 Δ 7 8 9

Choose security questions and answers for all three questions.

M FINN		
Activation		
Please choose three se	curity questions and enter their answers below:	
Security question 1	Choose security question	~
Security answer 1	Enter security answer 1	
Security question 2	Choose security question	~
Security answer 2	Enter security answer 2	
Security question 3	Choose security question	~
Security answer 3	Enter security answer 3	
		Next



Self-registration process (accessing for the first time)

Once you have completed the process online, the message below will be displayed and an email will be sent to you. Please note that the email may take a few minutes to arrive and could go to your junk mail.

M	FINN
Acti	vation
	Thank you for entering your details. You will shortly receive an email with a link to complete your account activation.

To complete registration, please click the link in your email.

JM FINN

You're nearly registered to use your JM Finn client portal. To complete your setup and get started, please click here.

If you need any assistance, please contact your Investment Manager.

Alternatively, please email portal@jmfinn.com and we will respond as soon as possible.

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 your JM Finn Investment Manager.

JM FINN		
Client Portal I	.ogin	
Username	Userna	ame
Password	Passw	ord
Forgotten username? Forgotten password?		
Help		Setup
You can find information or use the JM Finn portal in or guide.		The JM Finn portal p convenient access to value, transaction hi document repository messages.
		Please click here to a account.

You will be asked for three digits of your PIN, these three digits will be different every time.

Please enter characters $2,3\&4$ of your PIN b	elow	
	1	2
	4	5
	7	8
		0
Forgotten PIN?		

. orgottorr i





Dashboard

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

JM FINN Dasht	poard Holdings Cash stateme	nts Transactions I	Documents Messages	🖉 🗛 🕡 🕁
Welcome Last log in: 16/01/2025 15:22:02 Last updated: 18/01/2025 05:20:42 All prices are	delayed		Display currency GBP	PDF
Total Value of Portfolios ($\pounds 642,412.70$)			
Portfolios			Latest Documents	
			No documents found.	
DEMO INTERNET CLIENT 022660	DEMO INTERNET CLIENT 2 048636		View all documents	
Total £435,550.64	Total £206,862.06			
Est Gross Yield 2.63%	Est Gross Yield 3.53%			
Est Gross Income £11,456.96	Est Gross Income £7,310.15			
Accounts in Portfolio	Accounts in Portfolio			

Holdings

Clicking on "holdings" at the top of the page will take you through to your holdings summary.

Holdings		
Holding search		
Search instrument name or ISIN		
Account Summary		
Account name	Account number	Туре
DEMO INTERNET CLIENT	022660INT	Internal
DEMO INTERNET CLIENT 2	048636INT	Internal
Asset Allocation	0.001) • (000)	0%) Investment 4) Cash

B The portfolio picker allows you to view individual portfolios. This feature will adjust the entire page to show only assets and holdings of that particular portfolio.

The holdings page gives a full overview of your portfolios and provides a list of all the holdings in each portfolio.

Group by:									
Holding Type	~								
Holdings ()								CSV PDF	^ ≰
Description	Quantity	6 Price	G Current value	Book cost	Gain/Loss	() Income	() Yield	% Account	
Investment									^
ABRDN OEIC V GBL INFLATION- INKED BD INSTL INC	4,500.00	£1.319	£5,935.50	£8,068.31	-£2,132.81	£271.11	4.57%	0.93% 022660INT	
ALLIANCE WITAN PLC ORD GBP0.025	774.00	£12.90	£9,984.60	£7,793.60	£2,191.00	£206.66	2.07%	1.56% 022660INT	
ARTEMIS FUND MANAGERS STRATEGIC BOND I MONTHLY INC	22,200.00	£0.5211	£11,568.42	£12,302.19	-£733.77	£547.47	4.73%	1.81% 022660INT	
ASTRAZENECA PLC ORD USD0.25	400.00	£106.18	£42,472.00	£2,000.00	£40,472.00	£934.40	2.20%	6.65% 048636INT	
ALL CORP COM STK NPV	36.00	\$57.55	£1,623.85	£762.92	£860.93	£22.57	1.39%	0.25% 048636INT	
SELLEVUE HEALTHCARE TRUST PLC REDEEMABLE ORD GBP0.01	6,600.00	£1.38	£9,108.00	£12,252.31	-£3,144.31	£332.64	3.65%	1.43% 022660INT	
BLUEFIELD SOLAR INCOME FUND TD ORD NPV	8,700.00	£0.963	£8,378.10	£11,891.24	-£3,513.14	£765.60	9.14%	1.31% 022660INT	
CG ASSET MANAGEMENT LIMITED	40.00	£159.749	£6,389.96	£6,127.27	£262.69	£98.20	1.54%	1.00% 022660INT	
ANONE EUR0.25	300.00	€64.98	£16,174.91	£10,000.00	£6,174.91	£522.73	3.23%	2.53% 048636INT	
IAGEO PLC ORD GBP0.28 101/108	300.00	£24.285	£7,285.50	£5,796.00	£1,489.50	£237.84	3.26%	1.14% 022660INT	
FERGUSON ENTERPRISES INC. USD0.0001	90.00	£169.90	£15,291.00	£8,514.13	£6,776.87	£221.40	1.45%	2.39% 022660INT	
FUNDSMITH EQUITY FUND EQUITY I INC NAV	5,400.00	£6.6218	£35,757.72	£8,438.54	£27,319.18	£131.84	0.37%	5.60% 022660INT	
GENUS ORD GBP0.10	110.00	£16.62	£1,828.20	£3,936.99	-£2,108.79	£35.20	1.93%	0.29% 022660INT	
GREENCOAT UK WIND PLC ORD GBP0.01	4,000.00	£1.26	£5,040.00	£5,848.74	-£808.74	£400.00	7.94%	0.79% 022660INT	
GSK PLC ORD GBP0.3125	160.00	£13.415	£2,146.40	£8,140.08	-£5,993.68	£97.60	4.55%	0.34% 048636INT	
HALFON PLC ORD GBP0.01	200.00	£3.759	£751.80	£1.859.92	-£1.108.12	£12.40	1.65%	0.12% 048636INT	



Cash statements

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

	Cash stater	nents					
	Last updated: 06/12/2 All prices are delayed	2024 05:18:48					
	Filter by Date						
			th Last 6 months	Year to date	Last 12 months	Custom	
C	Date from 01/01/20	Date to	06/12/2024				
	Actions						
	L CSV	GBP V	Account type Account Picker All V DEMO INTE	RNET CLIENT 2 (048636INT)			~]
	Trade date	Settlement date	Description	Currency	Debits	Credits	Balance
	06 Dec 2024	06 Dec 2024	Closing Balance	GBP			£-9.66
	31 Jul 2024	31 Jul 2024	Interest charged on DR bal to Income Account	31/07/24 GBP	£9.66		£-9.66

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

Transactions

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

	Transacti	ons						
	Last updated: 06/1 All prices are delaye							
	Filter by Date							
			Last month	Last 6 months	Last 12 months	Custom		
0	Date from Date	from	Date to	م				
	Actions	All Buy	Seli Corporate	Action Transfer	All 2 selected			× ~
	Date	Account Number	Туре	Quantity	Description	Currency code	Price	Proceeds/Costs
	24 Jun 2024	022660INT	Corporate Action	-232.00	NATIONAL GRID ORD GBP0.1243 NPD	GBP	0	£0.00
	17 Jul 2024	022660INT	Corporate Action	-2,400.00	UNITED KINGDOM TREASURY 2.5% IDX/LKD 17/07/2024	GBP	0	£0.00
	01 Aug 2024	022660INT	Corporate Action	-90.00	FERGUSON PLC ORD GBP0.10	GBP	0	00.0£
	01 Aug 2024	022660INT	Corporate Action	90.00	FERGUSON ENTERPRISES INC. USD0.0001	GBP	0	00.03

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

Documents

Documents are stored on the portal for 3 years from the date they are received. You can filter them by date, document type, portfolio or by their read status. We advise you to download the documents you wish to keep.

One day Last month	Last 6 months Last 12 months ALL	Custom			
Date from Date to	Last 0 months Last 12 months ALL	Ouston			
	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				Unread only	
DEMO INTERNET CLIENT DEMO INTERNET CLIENT 2	Name		Date 🚽	Read	
PDF DEMO INTERNET CLIENT	Custody Statements Custody (250120231341220640)		25/01/2023	New	

Secure messages

In the interest 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 manager. This eliminates the need to send documents as attachments by email, which is highly susceptible to hacking. You will be notified by email if you receive a secure message. Certain types of instructions will not be accepted by secure message e.g. investment instructions, payment instructions or when changing contact details.

Folders Intex Sent				
Search messages	Sort order 🗸		New message	- 6
(j) No messages found in this folder.	То	Choose recipient	v	
	Subject	Choose recipient John Doe Jane Green	~	
	Compose	Bill Smith		

E After clicking "new message" you will be able to select a recipient, enter a subject and type your message.

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.



Security

G At the top of each page there is a security padlock. Clicking this will take you to the security page. Here you are able to reset your security questions, change your password, PIN and update other security settings under your profile.

			G
Transactions	Documents	Messages	₽ 0 0
			Security ort to

In order to reset your security qu security questions you won't be a	estions please click the below button. For security reasons once you have saved your able to view them.
	Reset security questions
Change password	
 Minimum number of charac Maximum number of charac Contain at least one upper of Contain at least one lower of Contain at least one number 	cters: 15 case character ase character
Current password	Enter current password
Please create a password	Enter password
Please confirm your password	Enter password
	Change password

Accessing more information

Clicking on the information icon will allow you to navigate to a new page. This page contains 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, including details regarding security features.

Please inform your Investment Manager of any payments being made.

Fraud alert allows you to raise a concern if you

Fraud Alert	F.A.Q. & User Guide	Bank Details
FRAU	DALERT	
ou feel you have been the victim of a cyber-attack or your eze your on-line access to the portal as a temporary meas	account has been hacked, JM Finn have the ability to automatically ure.	
ou wish your cash and dealing accounts at JM Finn to be r arrange this.	estricted in any way, please contact your Investment Manager who	
ill Name		
I Finn Username		
vestment Manager		
aud Description		
I'm not a robot		
SEND EMAIL		



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.

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.

Does the portal support two-factor security?

Two factor security is available to access the mobile app for devices that support biometric identification via fingerprint or facial recognition.

Which internet browsers or programs is the portal supported on?

The portal will function on desktop PCs and Apple Macs using most web browsers, including Microsoft Edge, Google Chrome, Firefox and Safari. The portal will not work on Safari on Apple Macs that are running macOS 10.13 High Sierra or older. This is an outdated operating system no longer supported by Apple. It will also not work on Internet Explorer due to outdated support by Microsoft, which we consider a risk to the security of your data.

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	View, download and print all your account documentation for the last 3 years from your personal library	View the current value of your portfolio
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 statements and cash statements	Secure login from your smart phone or tablet (if available) via biometric identity check

View the portal via the app Available at:







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