

JM FINN

Investment | Wealth



JM Finn Portal Guide

User guide for your JM Finn online account

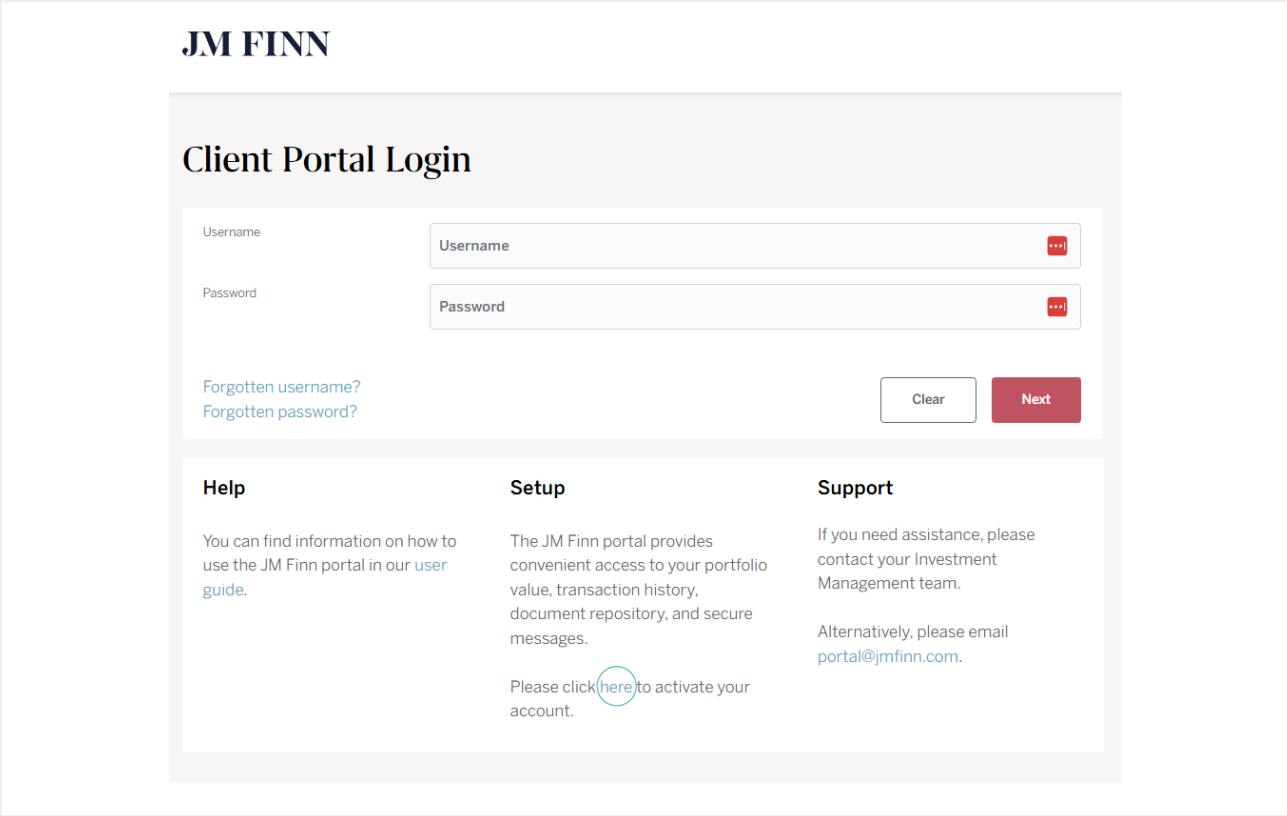
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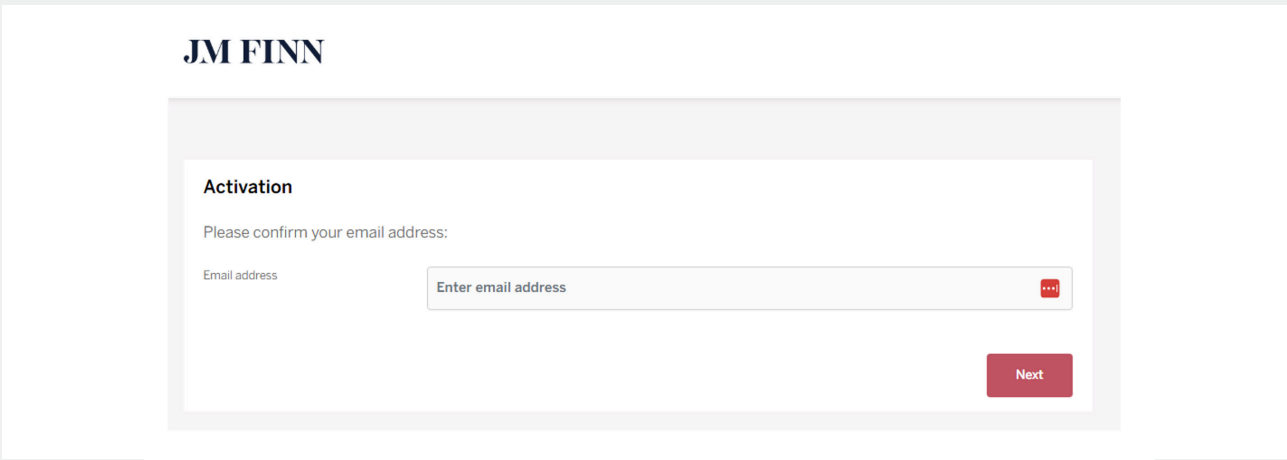
Self-registration process (accessing for the first time)

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.



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



Self-registration process (accessing for the first time)

Please enter your details to verify your identification.

JM FINN

Activation

Email address

Enter email address

Please verify your identity by confirming 3 details below:

Surname

Enter surname

Date of birth

Enter date of birth DD/MM/YYYY

National insurance number

Enter national insurance number

Next

Select a username and password.

JM FINN

Activation

Please enter your chosen username 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

123

456

789

0 ∞

Choose security questions and answers for all three questions.

JM FINN

Activation

Please choose three security 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

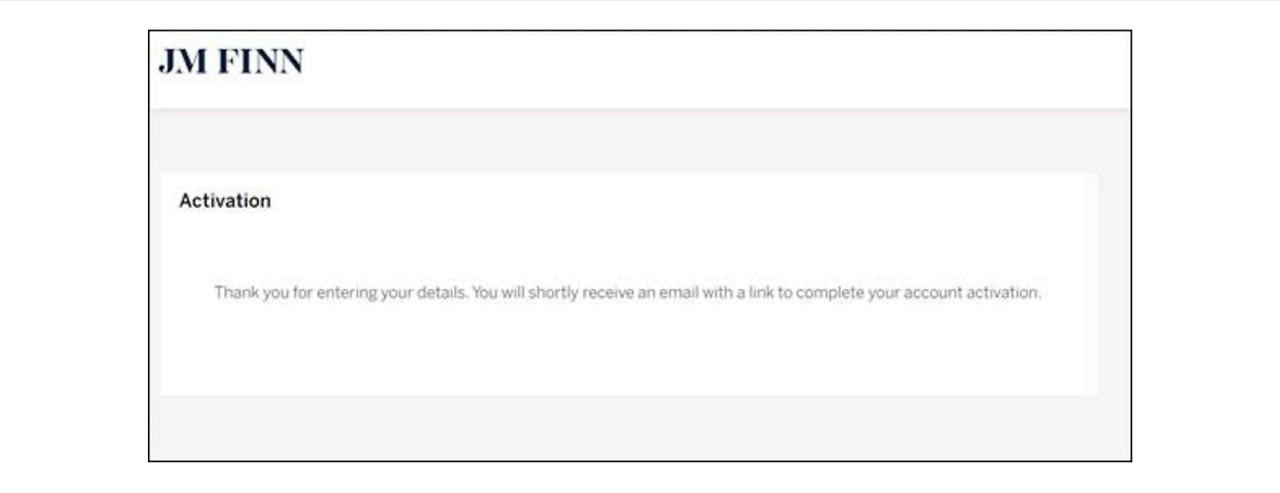
Next

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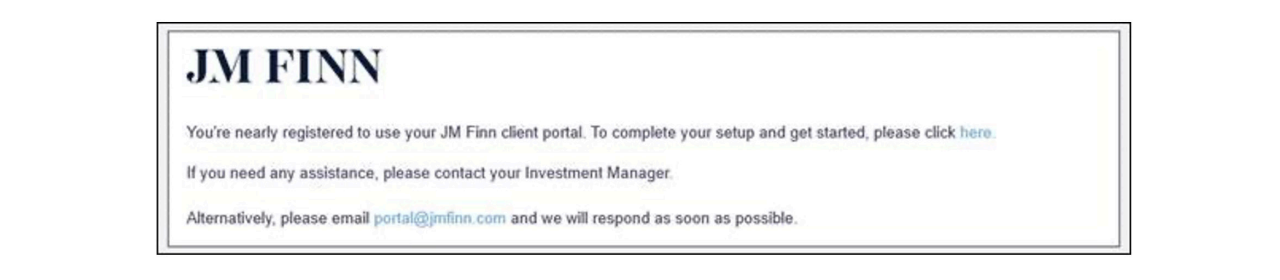
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Self-registration process (accessing for the first time)

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.

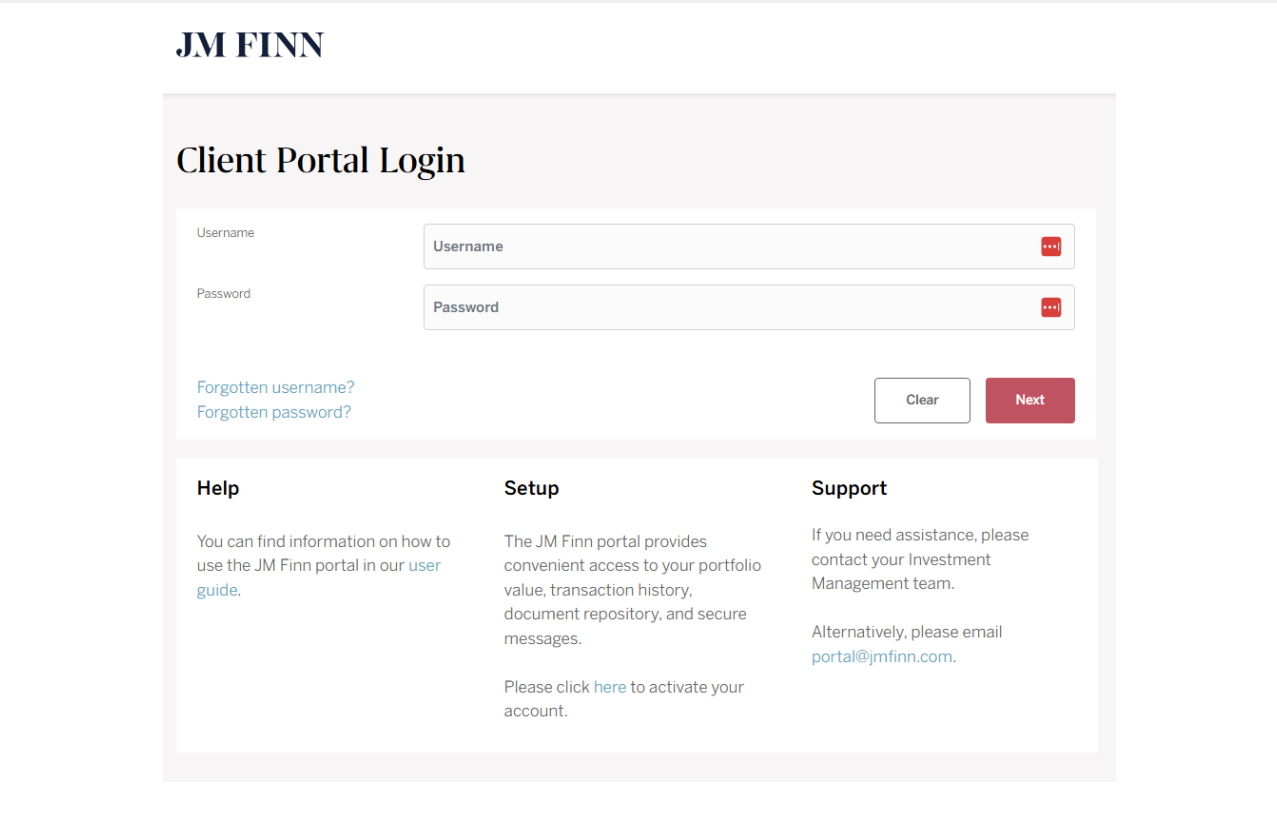


To complete registration, please click the link in your email.

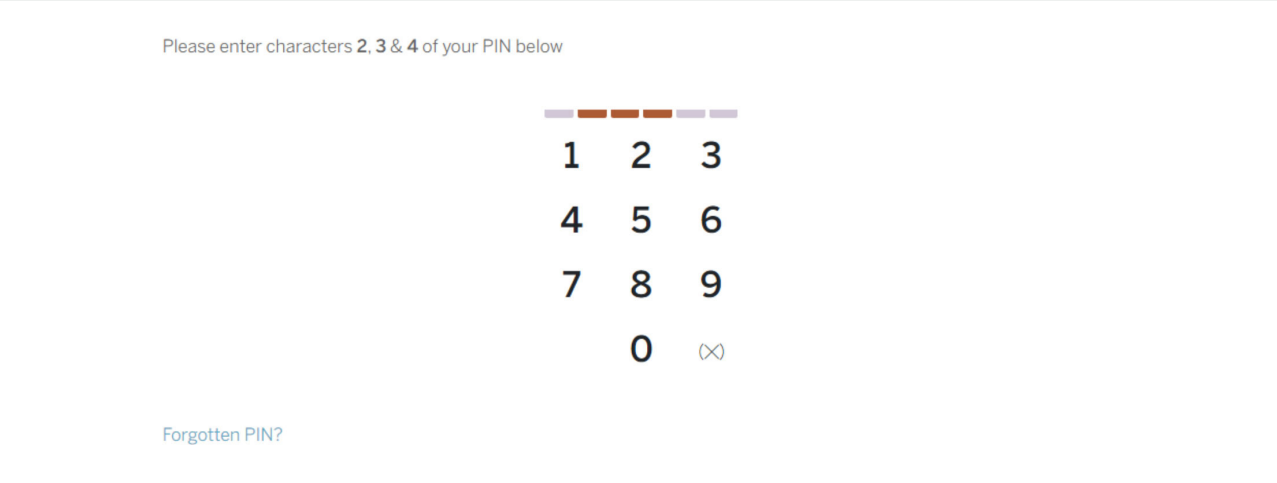


Login (accessing after you have already logged in once)

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.

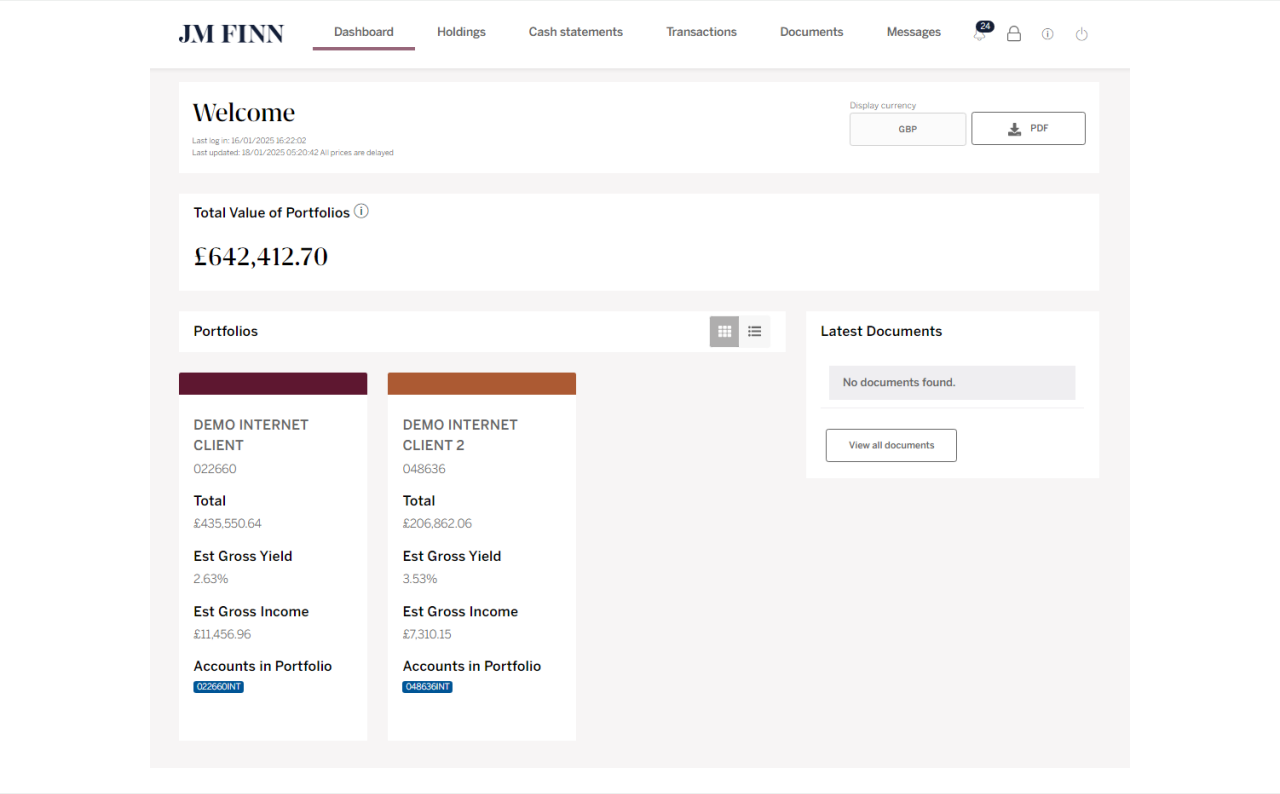


You will be asked for three digits of your PIN, these three digits will be different every time.



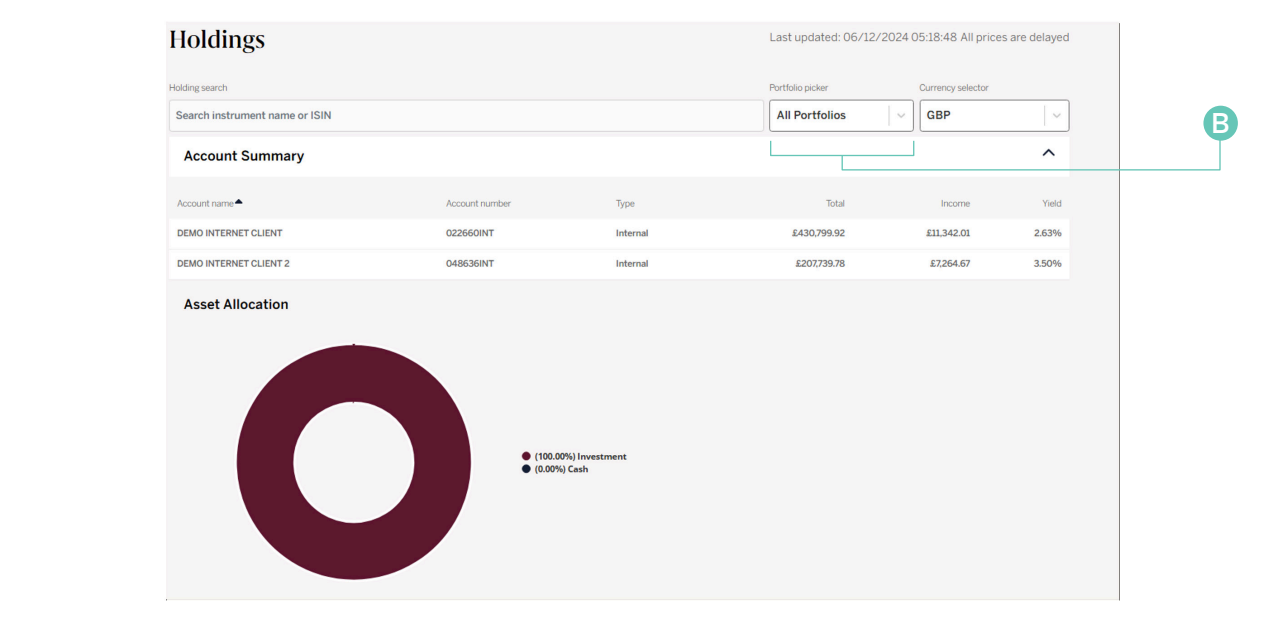
Dashboard

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.



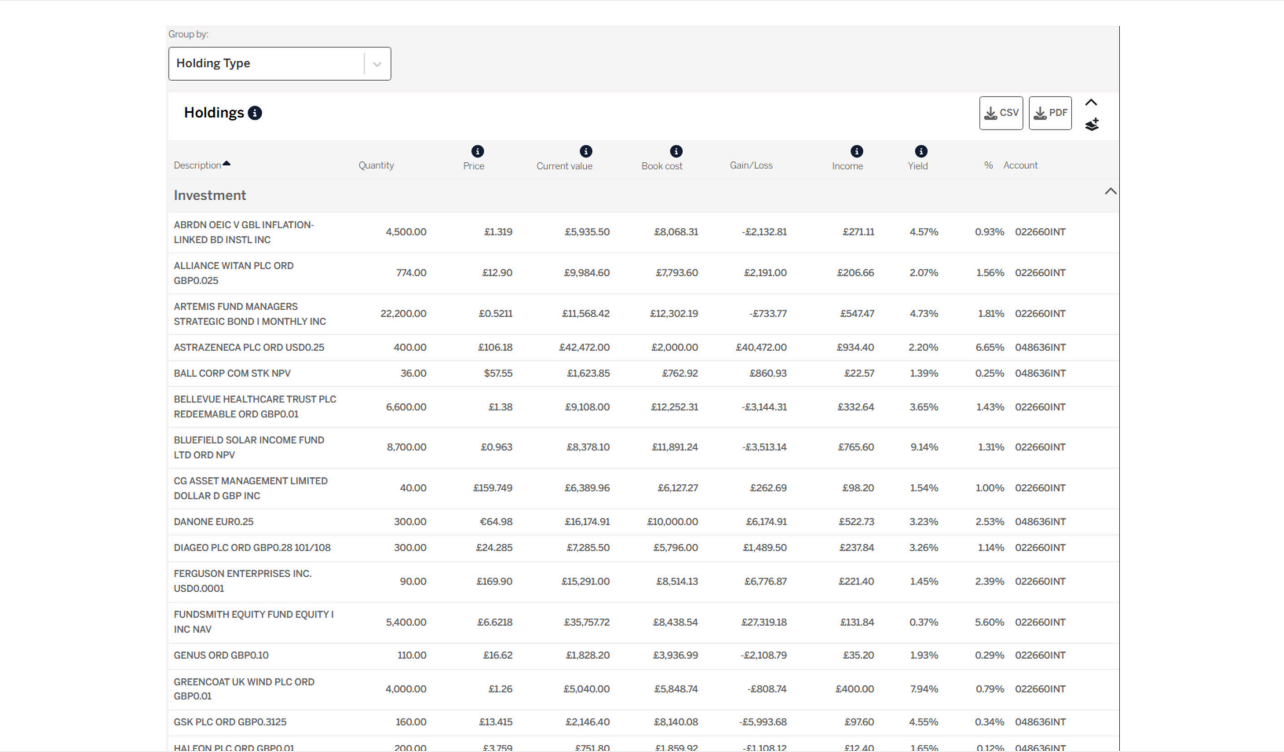
Holdings

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



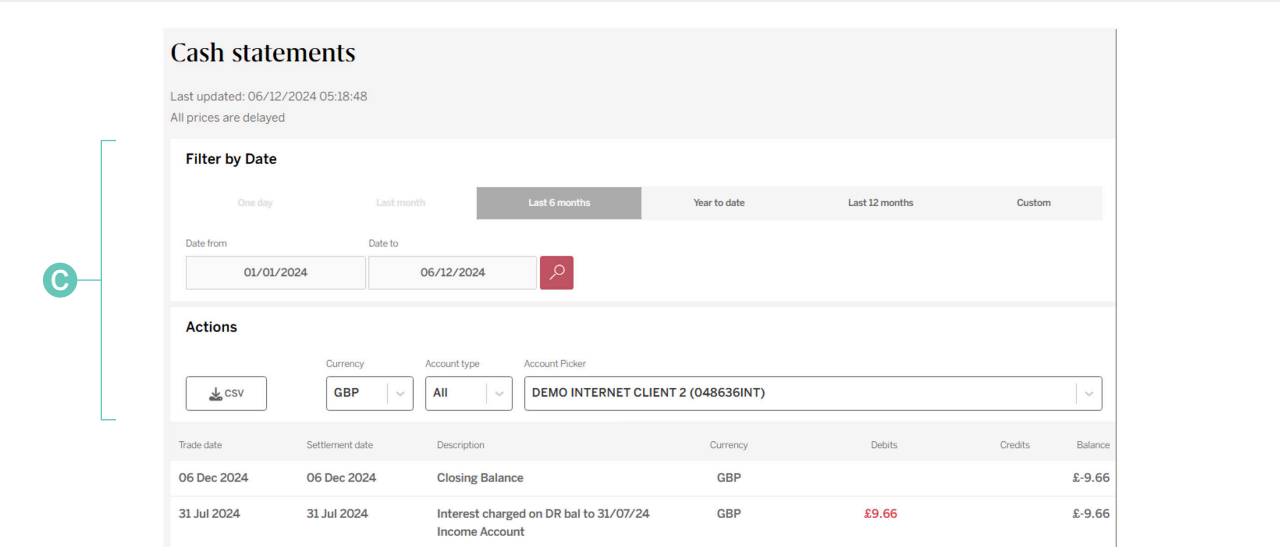
B The portfolio picker allows you to view individual portfolios. This feature will adjust the entire page to show only assets and holdings of that particular portfolio.

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



Cash statements

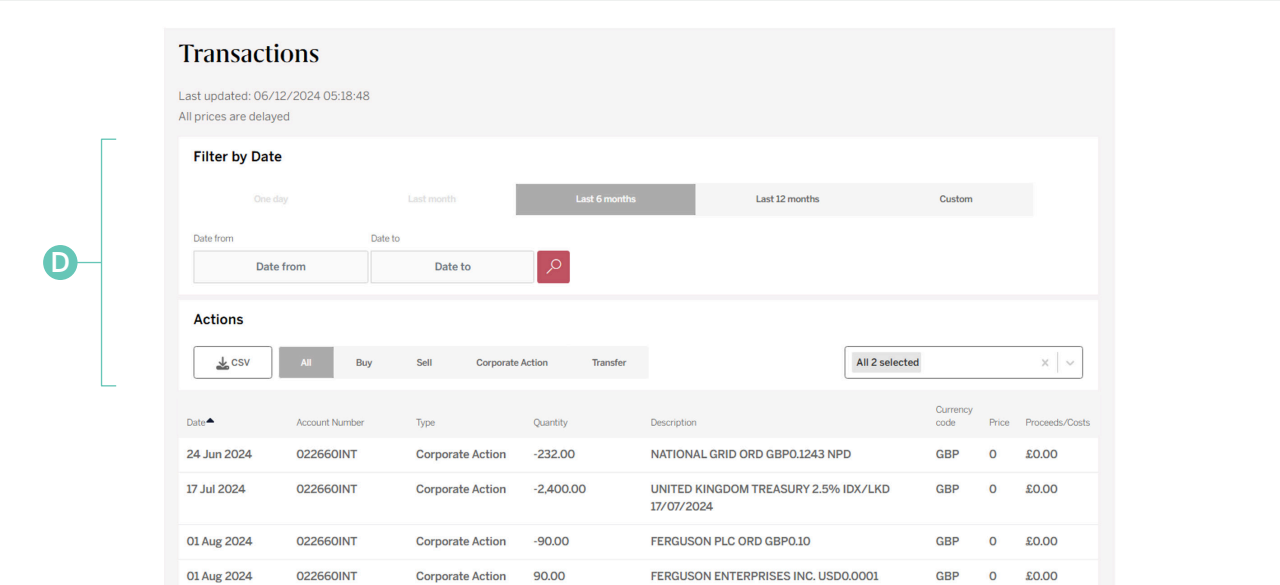
The cash statements section allows you to view all cash statements dating back 2 years.



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

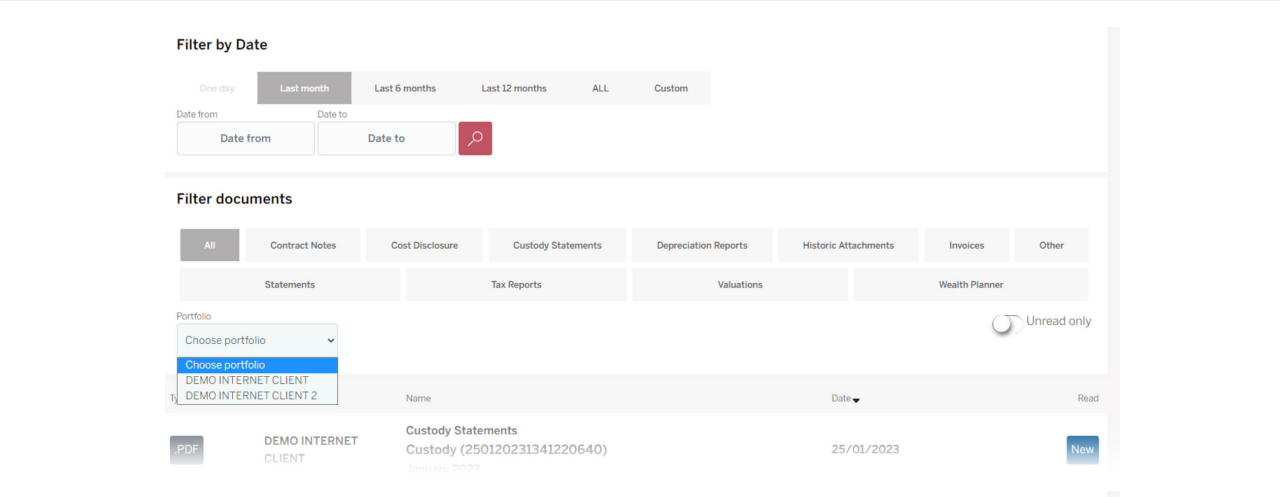
The transactions view allows you to view all transactions dating back 2 years.



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.

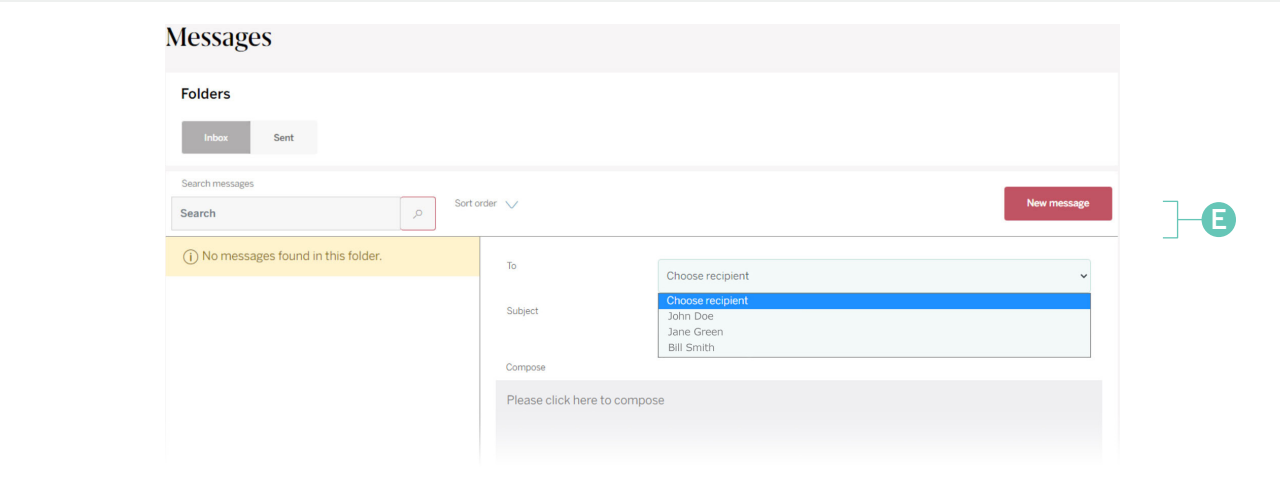
Documents

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.



Secure messages

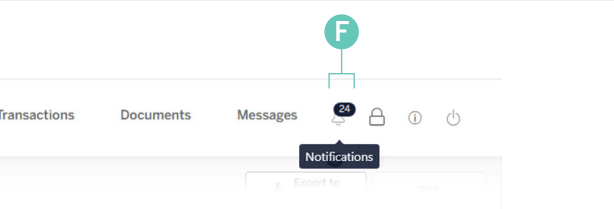
In the interest of reducing the chances of account documentation being intercepted, we have developed a secure messaging function for two-way messages between you and your investment manager. This eliminates the need to send documents as attachments by email, which is highly susceptible to hacking. You 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.



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

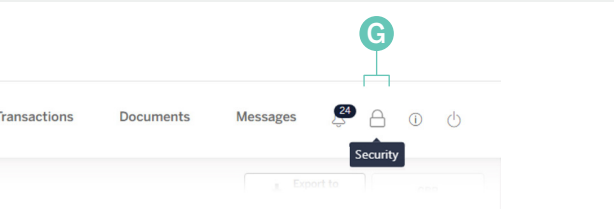
Personal library notifications

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.



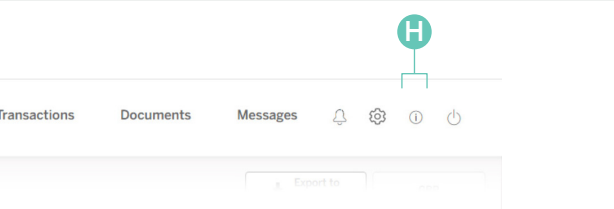
Security

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.



Accessing more information

H 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

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.

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

Fraud Alert

FAQ & 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.

Full Name

JM Finn Username

Investment Manager

Fraud Description

☐ I'm not a robot

reCAPTCHA
Privacy - Terms

SEND EMAIL

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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