Client List Improvements

Client Access Column

There are three steps to provide investors with access to these functions:

- A new Client Access column replaces the former Security and Status columns. The status and action details displayed under the column have been modified to:

  a. Invite
     - Status–Client has never been active
     - Action–Goes to the Invitation screen
  
  b. Active
     - Status–Client currently has online access
     - Action–Goes to the Client Access screen
  
  c. Pending
     - Status–Client has never been active
     - Action–Goes to the Invitation screen
  
  d. Locked
     - Status–Client currently has online access
     - Action–Goes to the Client Access screen
  
  e. Inactive
     - Status–Client had online status but currently does not
     - Action–Goes to the Invitation screen
Investor Experience Improvements

Streamlined Registration Process

› Several improvements have been made to the investor registration process. The Client Temporary Password and approval process is replaced with a temporary access code. The advisor can now request a temporary access code to be sent to the investor in an email with instructions. The access code is valid for 24 hours, but a new code can be requested by using the Pending link on the Client List page.

› After selecting Invite on the Client List page, the advisor is directed to the Invitation for Client Access page, where the advisor can send a system-generated email to the investor. One or multiple invites—up to 100 investors—can be sent at a time. Once the investor registers with the application, the advisor no longer needs to approve the investor for access.

After the invitation email, the registration process consists of four steps:

› SSN/TIN & Access code
› User Agreement
› Personal Info
› Review and Submit
Important considerations to remember during registration

› The access code is valid for 24 hours

› User Name requirements:
  – The User Name must be between 6 and 20 characters.
  – The User Name cannot contain the last four digits of your Social Security Number/Tax Identification Number.
  – Must be different from the previous User Name.

› Password requirements:
  – Must contain a minimum of six characters.
  – Must contain at least one numeric and one alphabetic character.
  – Must be different from your User Name.
  – Must be different from your previous five (5) passwords.

› Password cannot be same as the access code that was sent to the client.

Default Investor View

› VAdvisors can now assign the default client access under Settings > Client View List and choose their preference within the Client View Default column. The client access can still be changed after the registration from the Client View Setting menu.
Client Self-Service Tools

The login screen has been enhanced to include additional client level functionality for online access.

Forgot Password

Clients will be asked additional security questions to create a new password.

Forgot User Name

Clients will be asked additional security questions to receive their User Name through an email that is associated with their account.

New Client Access Screen

› **Client Access** is a new page that appears when users select the Locked or Active status. It provides information about the client’s online profile and an option to send an email to the client for password resets.

To learn more about the new Albridge Wealth Reporting, please contact your client service representative.

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