



SEI Wealth PlatformSM

AccessMyPortfolio.com Self-Registration Procedures.

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 3rd party to an account, and not an account owner, you must first contact the account owner and advisor to complete the required www.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) Visit www.accessmyportfolio.com and select **Sign Up for Online Access**.



- A. REGISTER AND SET UP ONLINE ACCESS FROM YOUR COMPUTER OR TABLET (*Cannot set up from phone*)
- B. Before proceeding further, wait until you receive an email from noreply@seic.com
 - You should receive the email a few minutes after clicking “**Register for online access**”
 - Check Spam/Junk Folder if you do not see the message in your Inbox
 - Receiving this email confirms that you can begin with the registration process

If you have questions or need assistance, please contact your financial advisor or the SEI Help Desk at 1-800-734-1003.

- 2) Fill in your last name, last four digits of your tax ID, date of birth (mm/dd/yyyy), postal code, and your email address. Your email address must be the email address on file with SEI Private Trust Company. Select **Continue**.

Access My Portfolio Contact Us

Help us identify your account.
All information is required

Last Name

Date of Birth (mm/dd/yyyy)

First 5 Digits of ZIP Code

Last 4 Digits of Social Security Number

Email Address

[Continue](#)

[Disclaimer](#) | [Terms & Conditions](#) | [Privacy Policy](#)

- 3) Create your user ID and select **Continue**.

Access My Portfolio Contact Us

Create New User ID.
Your user ID must be unique and can contain most alphanumeric characters.

Create User ID

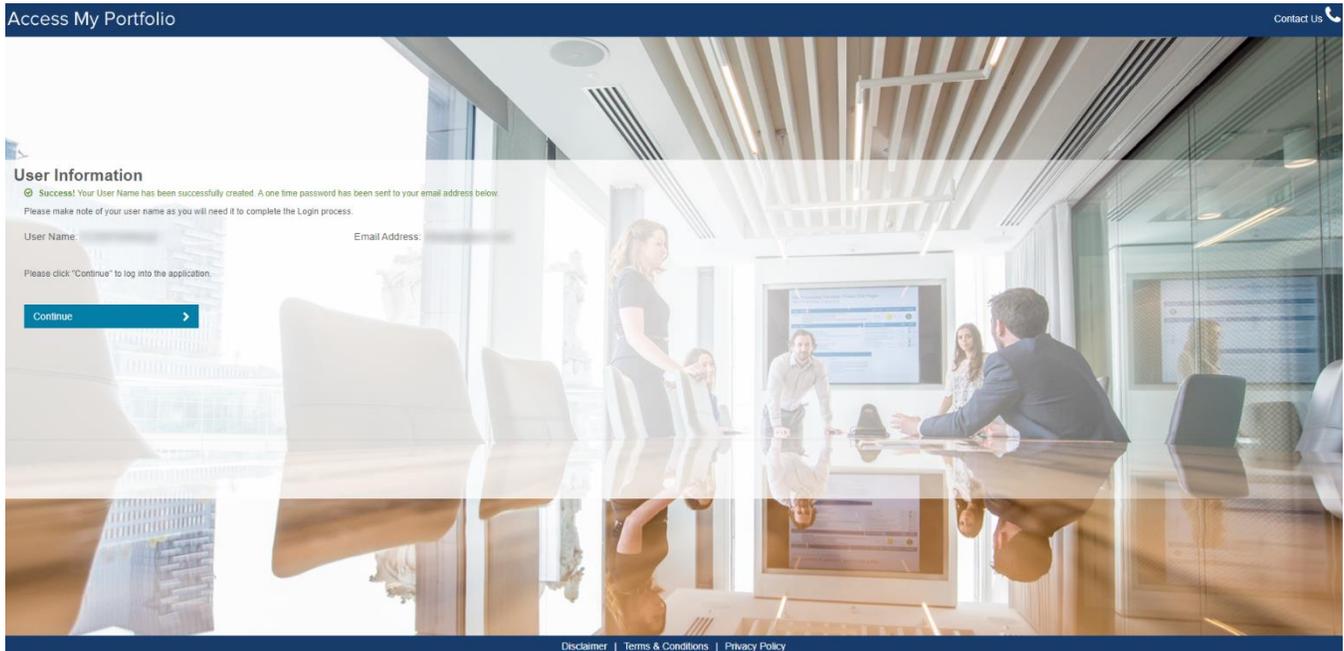
[Continue](#)

[Disclaimer](#) | [Terms & Conditions](#) | [Privacy Policy](#)

NOTE: THIS MAY TAKE A FEW MINUTES AS THE SYSTEM IS CHECKING TO MAKE SURE YOUR USER ID HAS NOT PREVIOUSLY BEEN USED. DO NOT REFRESH YOUR BROWSER.

If you have questions or need assistance, please contact your financial advisor or the SEI Help Desk at 1-800-734-1003.

- 4) Upon receiving the successful username creation message, select **Continue to log in**. A **one-time pin** has been sent to the email address you entered. You will be prompted to enter the pin when logging in for the first time.



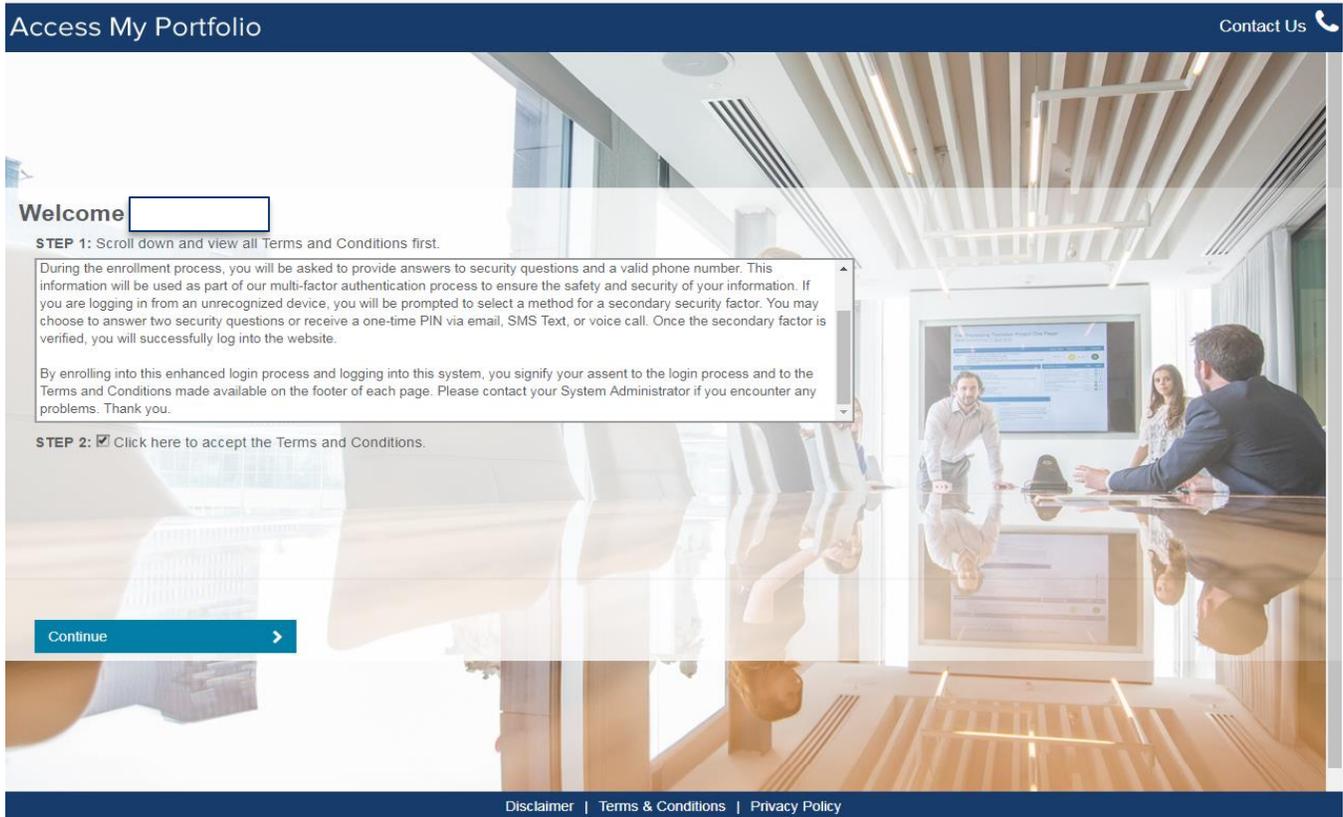
- 5) Enter your **User ID** and **one-time pin**. Then select **Log In**.

Note: Until you enter in your newly created User ID, it will read as “Password” instead of “One Time Pin”

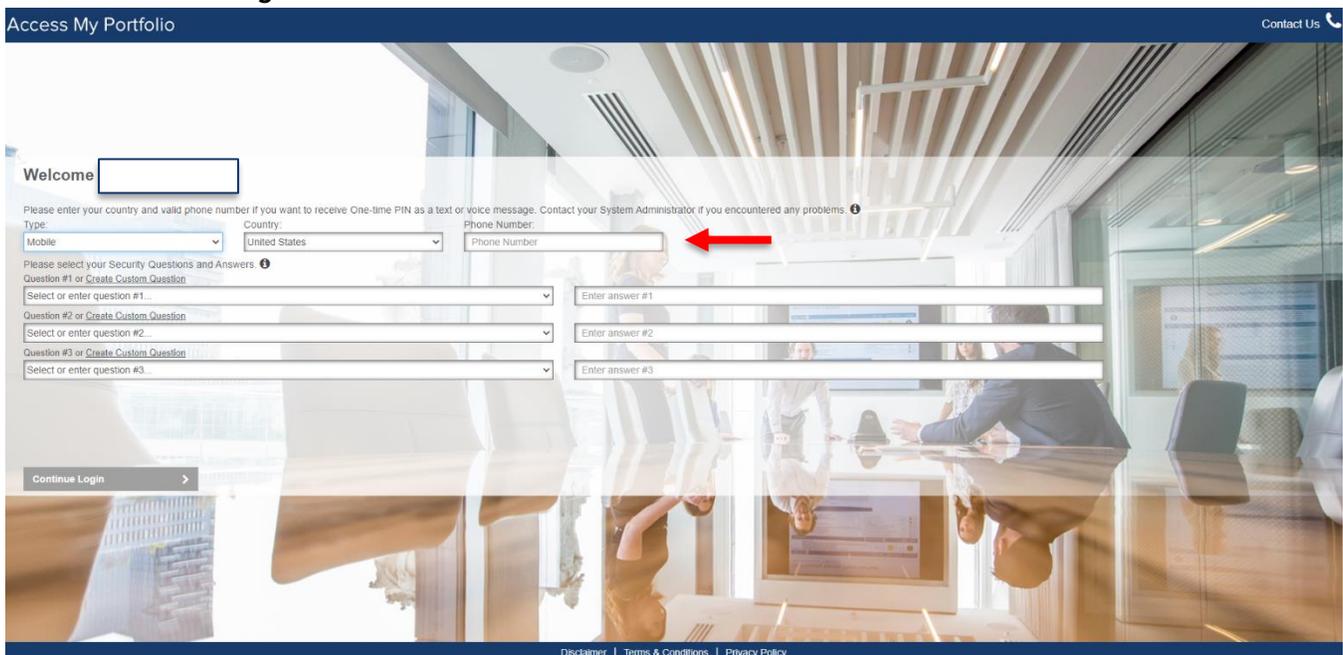


If you have questions or need assistance, please contact your financial advisor or the SEI Help Desk at 1-800-734-1003.

- 6) Scroll through and read the **Terms and Conditions**. Select the box in Step 2 to accept the **Terms and Conditions**. Select **Continue**.



- 7) Enter a valid **phone number** to receive a text or voice message for a one-time pin in the event of an account lockout, if you forgot your password, or if you are accessing your account from an unregistered device. Select 3 **security questions** and provide answers to those questions. Select **Continue Login**.



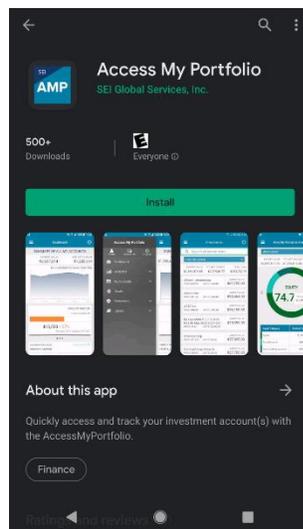
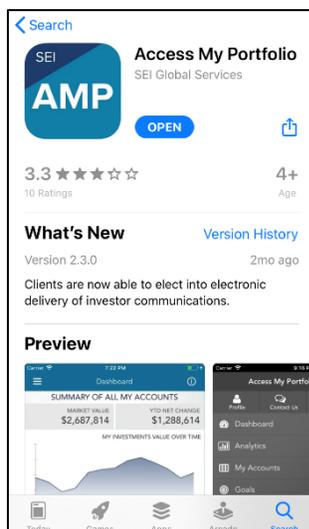
If you have questions or need assistance, please contact your financial advisor or the SEI Help Desk at 1-800-734-1003.

- 8) Create and confirm a **new password**. Passwords need to be 8-20 characters in length and must contain at least one (1) uppercase letter, one (1) lowercase letter, and one number (see the “i” icon for more information). The password cannot contain the user’s first or last name and may not have more than two repeating characters. Most special characters are supported, but “&”, “<”, “>”, and spaces are not allowed. On this page, you also have the option to select “Remember Me” and by doing so, you will not have to answer security questions when logging into the site in the future. After completing these steps, Select **Continue Login**.



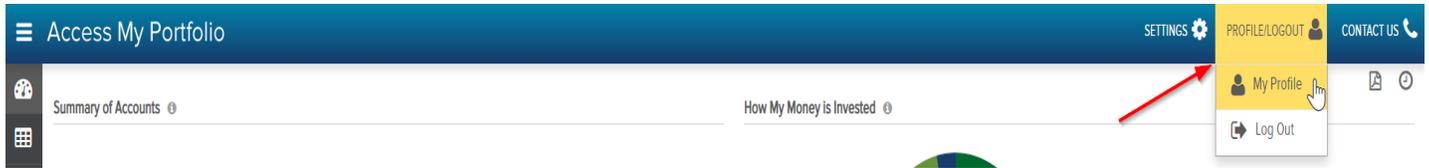
- 9) Congratulations! You have officially set up your User ID with www.AccessMyPortfolio.com. Your financial advisor can provide you with website overview guides to help you get familiarized with the site.

****After you have registered, you may want to use the AccessMyPortfolio App on your Apple or Android mobile device. Download the App by going to the Apple or Google Play App Store and search “access my portfolio”****



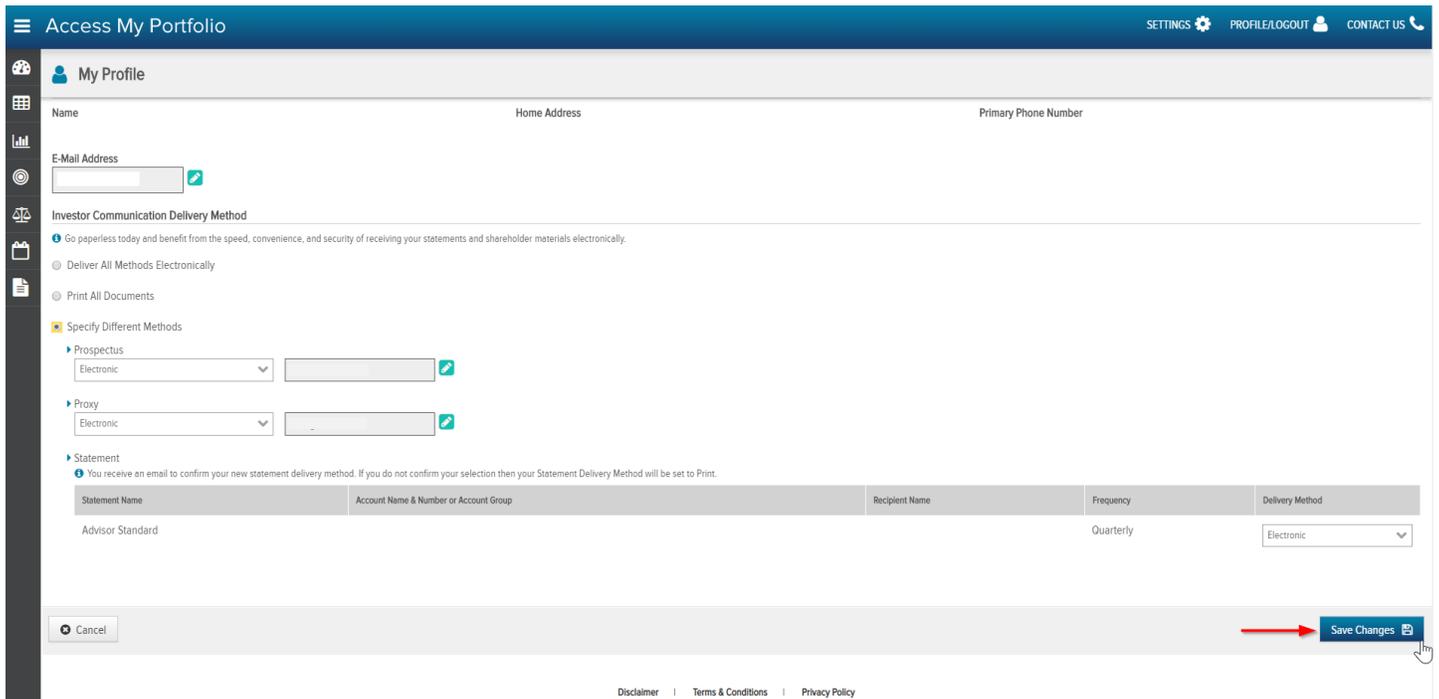
If you have questions or need assistance, please contact your financial advisor or the SEI Help Desk at 1-800-734-1003.

10) As the last (optional) step of the set up process, if you would like to opt into **electronic delivery** of your various account documents (**statements, prospectus and/or proxy material**), start by clicking on **PROFILE/LOGOUT** in the top right-hand corner and then “My Profile.”



11) Once on “My Profile,” you can see whether you are signed up for Print or Electronic delivery for Prospectus, Proxy or Statement materials. For more questions on these items please contact your financial advisor. If you’d like to make changes to your Delivery Methods, check the appropriate boxes or choose the appropriate dropdown options (Print or Electronic) and click “Save Changes” in the bottom right-hand corner.

NOTE: If you switch from Print to Electronic Statements, you will be prompted to verify this via a pending email (See below “Your electronic delivery selection is pending your email confirmation”). This time, the email will be from SEIPrivateTrust@seic.com. To verify the changes, click on the hyperlink in the email, which will automatically bring you back into www.AccessMyPortfolio.com. If done correctly, you will receive the message “Your statement delivery method has successfully been updated” highlighted on a green banner.



If you have questions or need assistance, please contact your financial advisor or the SEI Help Desk at 1-800-734-1003.

Investor Communication Delivery Method

 Go paperless today and benefit from the speed, convenience, and security of receiving your statements and shareholder materials electronically.

Deliver All Methods Electronically

 Your electronic delivery selection is pending your email confirmation.

 Reply  Reply All  Forward



Thu 1/30/2020 2:18 PM

SEI Private Trust

SEI Online Statement Notification

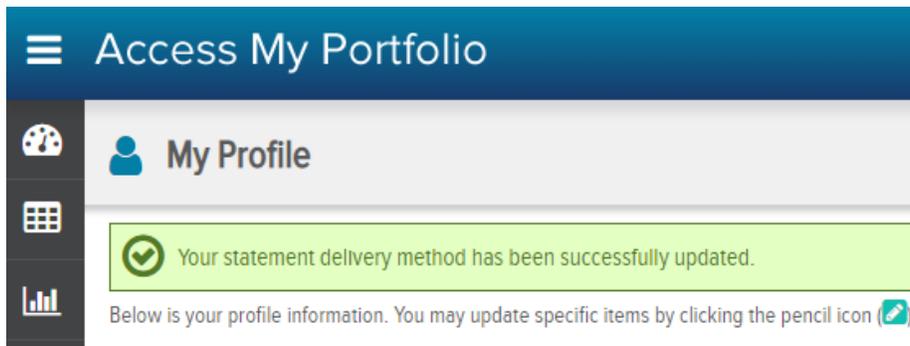
To

SEI New ways.
New answers.®

Dear Valued Client:

You have recently registered for electronic delivery of your SEI Private Trust Company statement(s). Please click the link below to complete the registration process. This registration must be accepted within the next 72 hours, or your documents will remain as print delivery. When selecting the hyperlink, please make sure you are logged out of Access My Portfolio.

<https://www.accessmyportfolio.com?consentEStatement=15697063&isFirmEmployee=0&firmId=81212&userId=UE81S1JpcGxleVRlc3Q=> 



Access My Portfolio

 **My Profile**

 Your statement delivery method has been successfully updated.

Below is your profile information. You may update specific items by clicking the pencil icon 

If you have questions or need assistance, please contact your financial advisor or the SEI Help Desk at 1-800-734-1003.