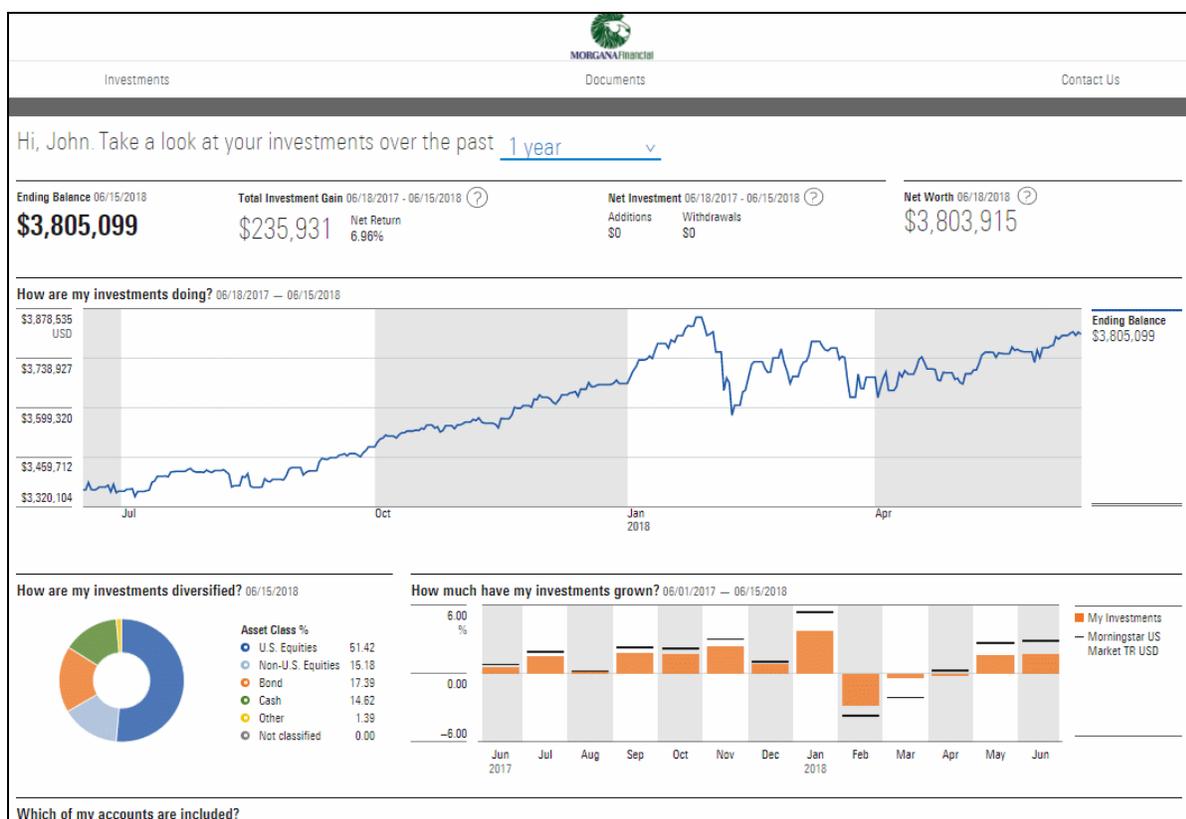


Logging in to the Client Web Portal

Welcome to the Client Web Portal (CWP). In this manual, you will learn what the CWP is and how to create your CWP account. The following topics are covered.

Overview

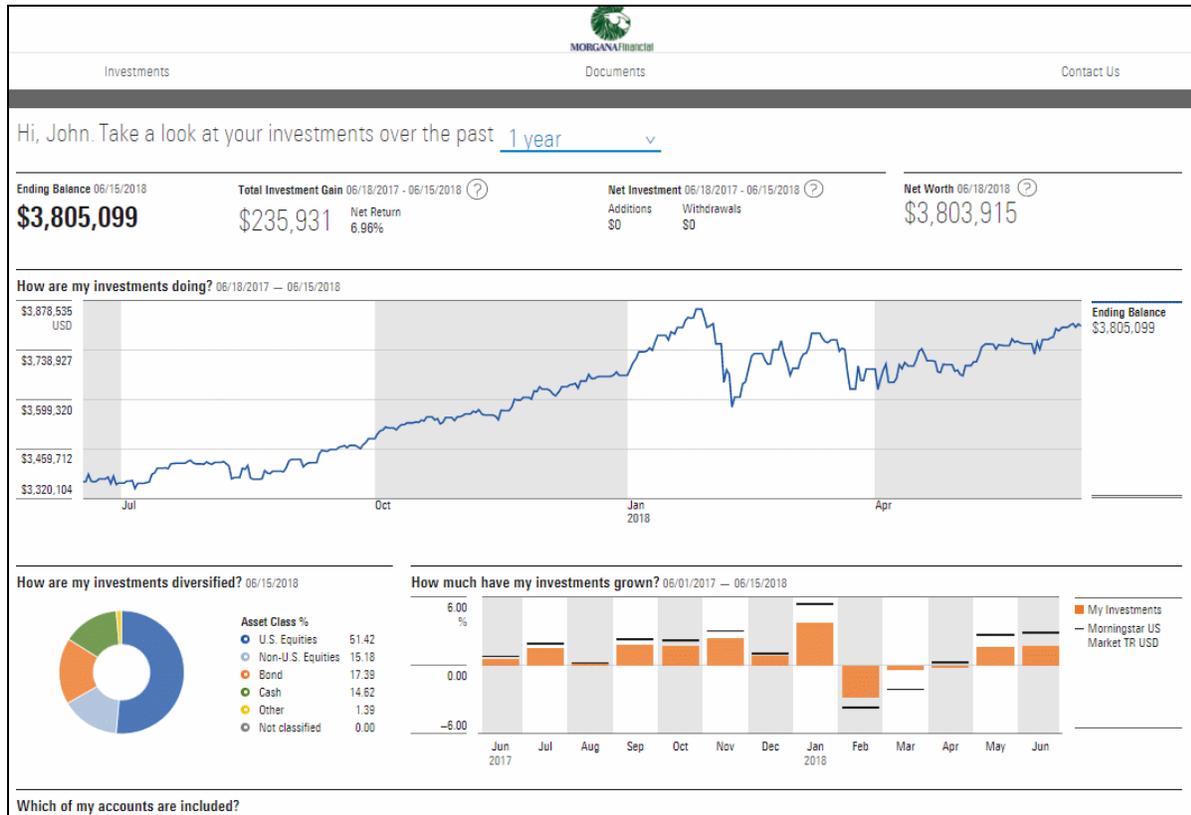
- ▶ What is the Client Web Portal?
- ▶ How do I create my CWP account?
- ▶ What happens if my password token expires?
- ▶ What should I do if I forget my password?



The CWP is secure website that you can log in to using your email and a custom password. Once inside, you can view information about your portfolio, accounts and even the individual securities constituting your accounts. You can also send sensitive documentation to me securely, and receive paperless statements and documentation.

What is the CWP?

Note: Click [here](#) to learn about the different features available within the CWP.



Log in to the CWP using your email address and a custom password you create. Before logging on for the first time, check your inbox. There, you will find an email from me, that contains instructions on how to activate your account. It's important that you check your email as soon as possible. The link you receive from me will expire within 12 hours.

How do I create my CWP account?

To create your custom password, do the following:

1. From your **Email inbox**, open an email from me, then click **Create Password**. The Create Password box launches.

Welcome to
Sample Capital Management's
Client Web Portal!

Here's what you'll get when you finish creating your account:

- One place to view your balance and investment performance
- 24/7 access to your finances, on any device, anywhere
- Easily and securely share documents with your advisor
- Access to Morningstar's in-depth investment research and analysis

Create Password

Click here to begin

2. From the **Create Password** box, enter a password into the **New Password** box. Then enter the **same password** into the **Verify New Password** box.

Create Password Cancel Create

User Name
jane.doe@mydomain.com

New Password*

Verify New Password*

Password Requirements

- Be at least 8 characters
- Contain at least one alpha(a-z) character, and one number or symbol
- Not contain 4 or more sequential or repeating characters (e.g. aaaa or 1234)
- Not contain your username

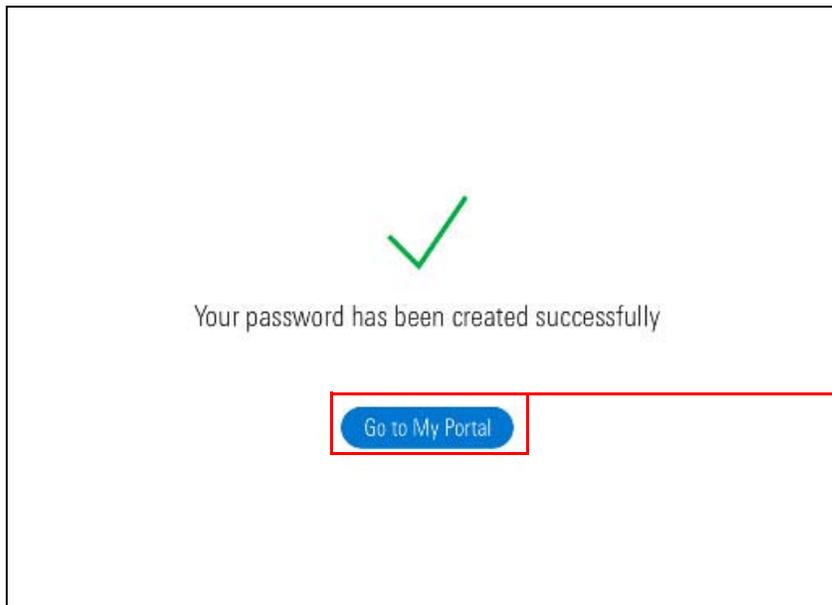
Refer to these password requirements when creating your password

Enter and verify your password here

You information is protected by bank level security.

3. Click **Create**. Once your new password is accepted, a dialog box will launch.

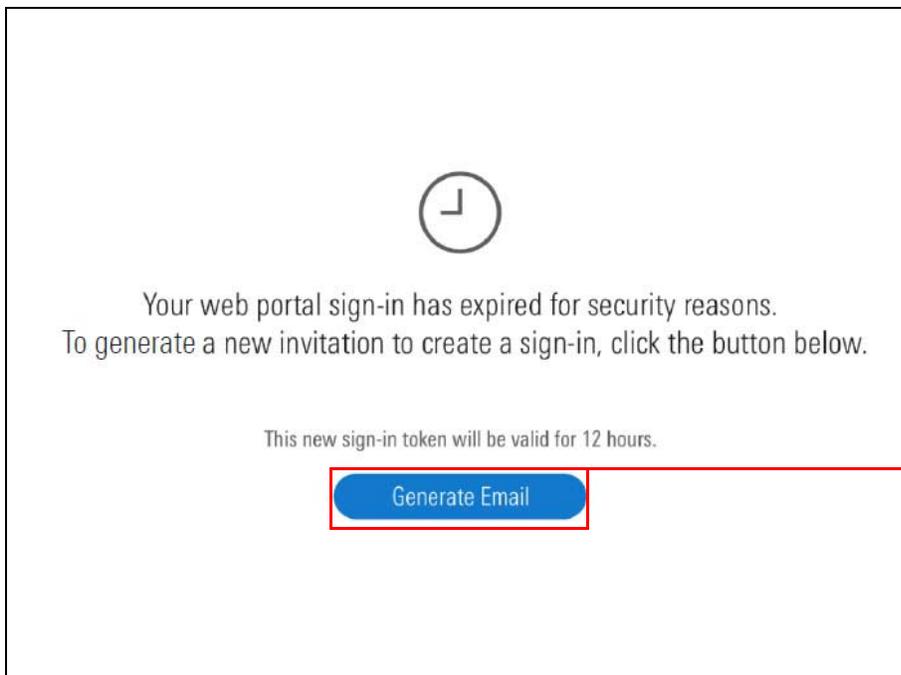
- From the **Successful** dialog box, click **Go to My Portal** to enter the CWP.



Click here to enter the CWP

If you don't have a chance to activate your CWP account within 12 hours of receiving your initial email, you will receive a message alerting you that your invitation has expired. To generate a new invitation, click the Generate Email button. A new token will automatically generate.

What happens if my password token expires?



Click here to generate a new invitation the CWP

From there, follow the steps within [How do I create my CWP account? on page 7.](#)

If you forgot or want to change the password you selected when you initially created your account, use the **Forgot your Password?** link with the log in screen of the CWP to reset your password. To reset your custom password, do the following:

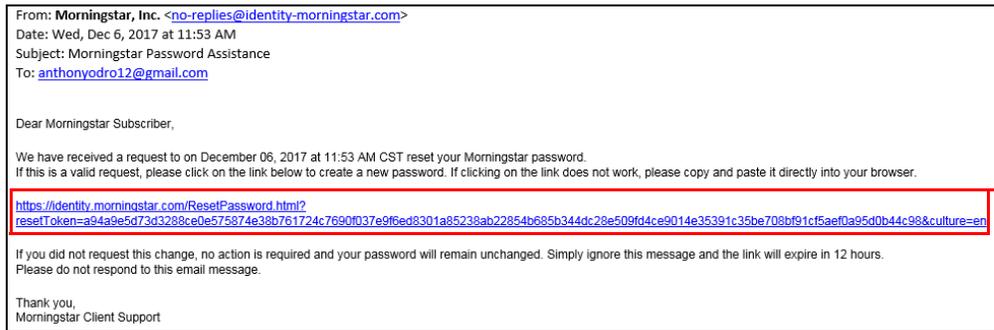
What should I do if I forget my password?

1. In any **browser**, launch fp.morningstar.com. The Login screen opens.
2. From the login screen, click **Forgot your password?** The first Reset Password page opens.

3. In the **E-mail Address** field, enter your **email address**.

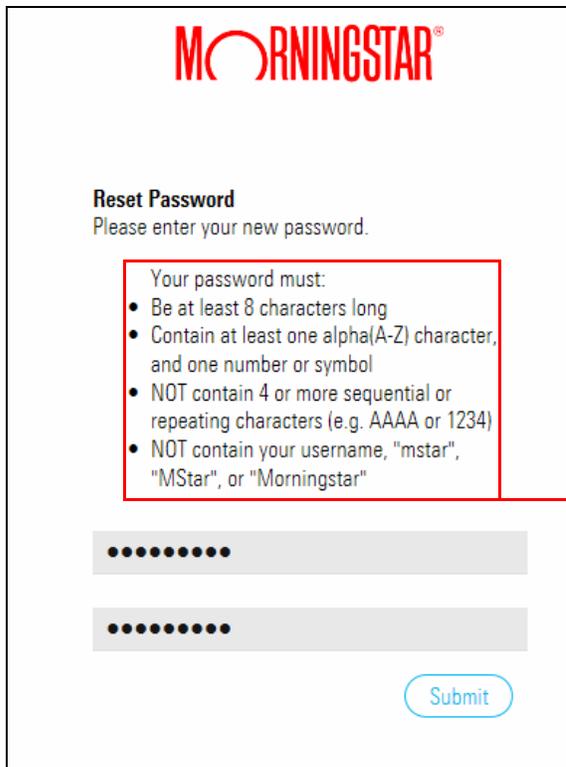
4. Click **Submit**. Check your **e-mail inbox** for the **Morningstar Password Assistance** email sent from Morningstar, Inc.

- From the Morningstar Password Assistance email, click the **link** in the center of the message. The second reset password page opens.



Click this link

- Enter and verify your **custom password** then click **Submit**. A message stating that your password has changed appears.



Be mindful of these requirements when setting your custom password

- In any browser, launch fp.morningstar.com. The Login screen opens.

8. Enter your **email address** and **custom password**.

The image shows a login form with two input fields. The top field contains the email address "anthonyodro12@gmail.com". The bottom field contains a series of ten black dots representing a password. A red rectangular box highlights both input fields. To the right of the box, a grey callout box with red text says "Enter your email address and new custom password here". Below the input fields, there is a link "Forgot your password?" and a blue "Sign In" button.

9. Click **Sign In**.