

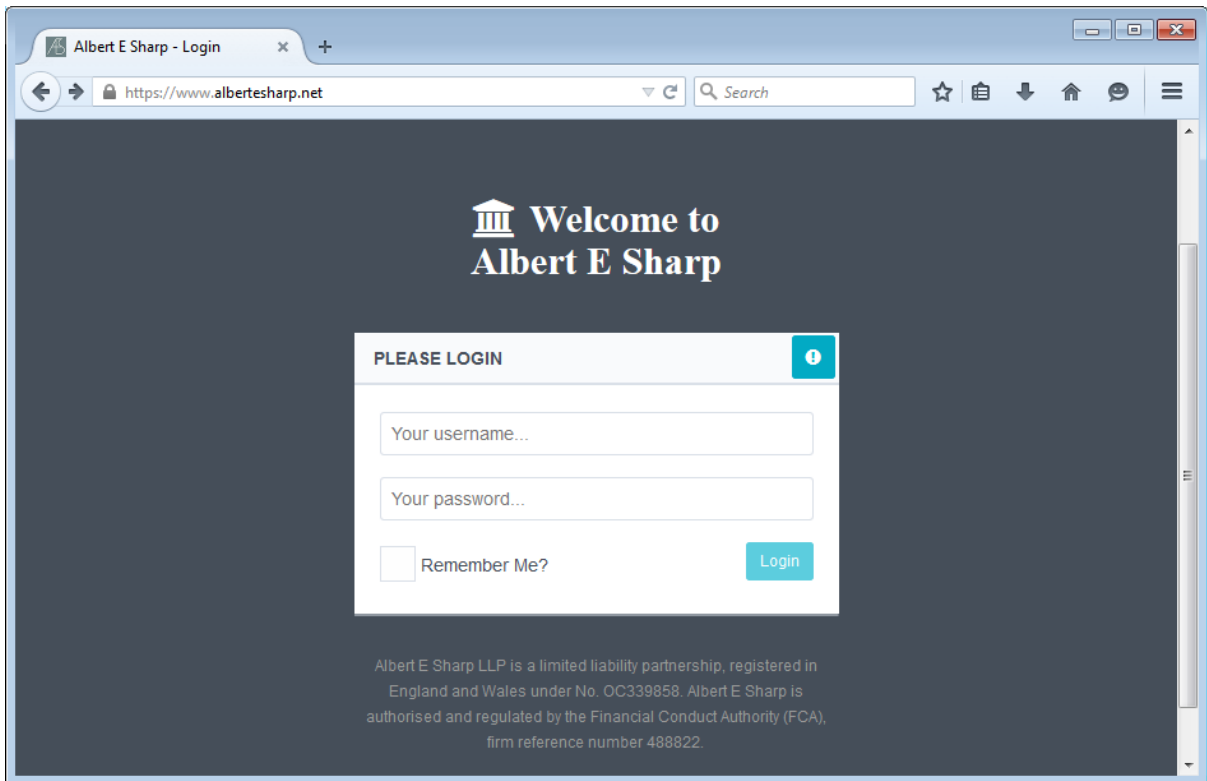
# ALBERT E SHARP

INVESTMENT MANAGEMENT & STOCKBROKING

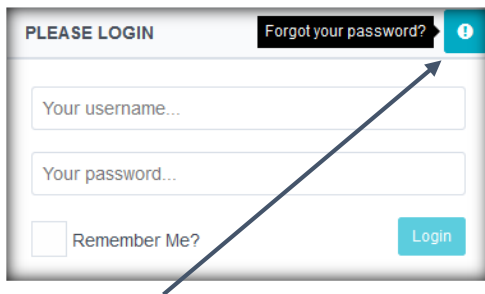
## Albert E Sharp IFA Web Portal User Guide

### Logging In:

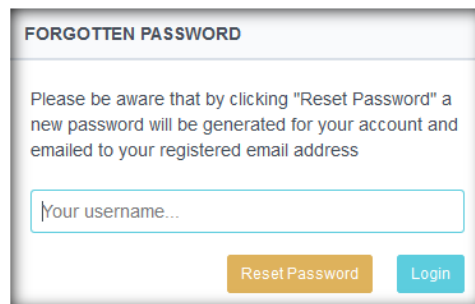
To access the site, visit [www.albertesharp.net](http://www.albertesharp.net), at which point you will be presented with the screen shown below:



Your username will usually be your email address, and you should have been provided with a temporary password, which will have been sent to this same email address. If you have forgotten your password, you can click the forgotten password icon in the top right hand corner of the login tile, and request a new temporary password be sent to your email address:



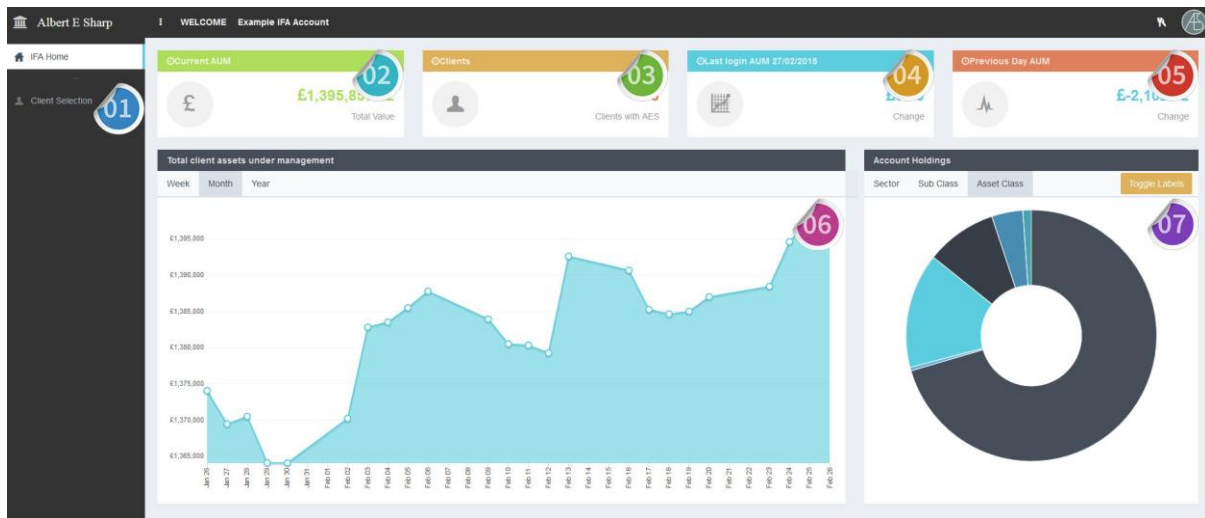
Forgotten password icon.



You will be prompted to enter your email address.

## Dashboard:

Upon successfully logging in, you will be presented with your firm dashboard, which will display a synopsis of your account information:

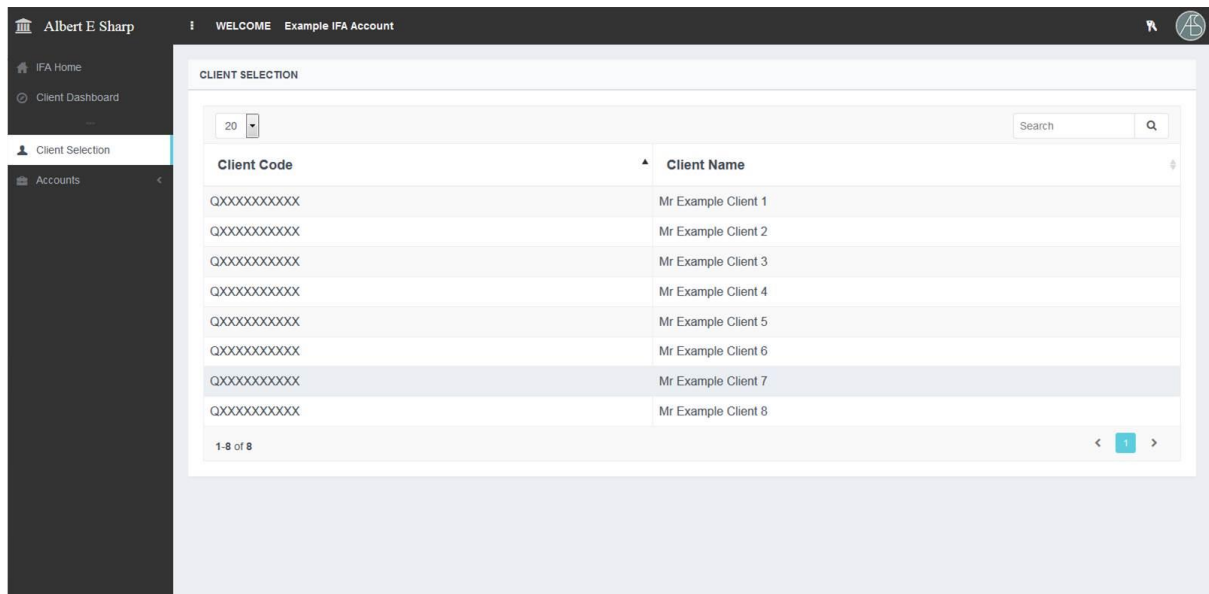


The information available includes:

- 01 Client Selection Button. This button will be visible in the extended sidebar, and will take you to a list of your clients (see overleaf screen grab).
- 02 Current AUM Tile. This tile will display the most recent value for your assets under management with AES, this will be as at close of business on the previous working day.
- 03 Clients Tile. This tile will display number of clients with AES, each of these clients will be selectable from the Client Selection Button (see item 1).
- 04 Change Since Last Login Tile. This tile will show the change in value of your assets under management since your last login. The date you last logged in will also be displayed. †
- 05 Change Since Prior Working Day Tile. This tile will show the change in value of your assets under management from the previous working day.
- 06 AUM Value Line Chart. The default time frame will be one month, but it is also possible to toggle between week and year. You will be able to see portfolio values at earlier dates by hovering your cursor over a given point of the chart.
- 07 Asset Allocation Pie Chart. Default tab is asset class, but you can choose between subclass and sector also using the tabs at the top of the tile. You can see what each segment represents by clicking on the individual segment, or clicking the toggle labels button.

## **IFA Client Selection Page:**

Having pressed the client selection button, you will be presented with the below list of your client's portfolios:



From this page, you will be able to select any of your clients. Upon selecting a client you will be taken to the 'Client Dashboard' (the view seen by your underlying client upon logging in), you will then have access to all the subsequent client functionality. Please see the 'Albert E Sharp Client Web Portal User Guide' for full details of client functionality.

### **Notes:**

*† - The first time you login, and if you login more than once on the same day, the change will show as Zero.*

You will automatically be logged out of your session upon closing your internet browser, upon turning off your PC, or after 20 minutes of inactivity.

Albert E Sharp LLP is a limited liability partnership, registered in England and Wales under No. OC339858. Albert E Sharp is authorised and regulated by the Financial Conduct Authority (FCA), firm reference number 488822.