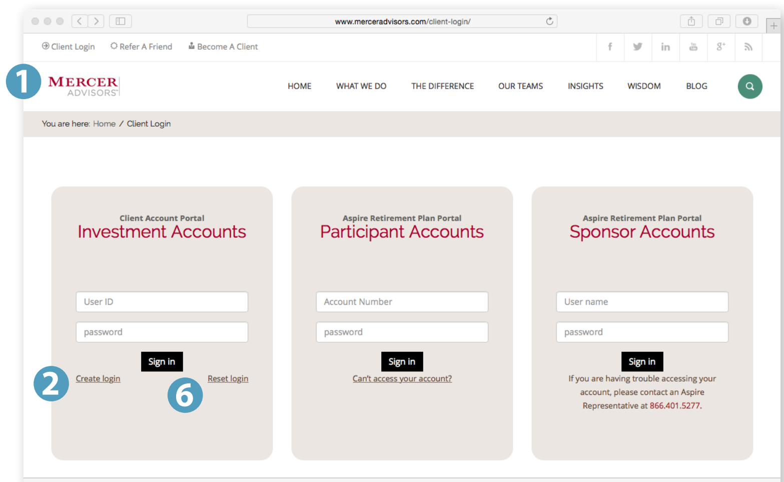
Mercer Advisors

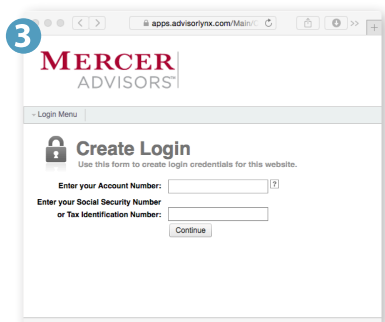
# Client Portal Guide

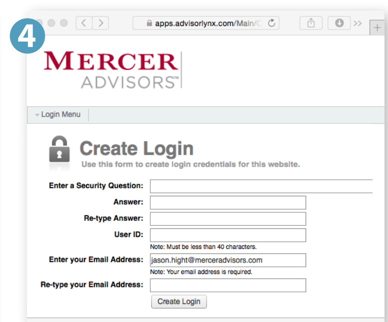
Leveraging leading-edge technology, the Client Portal provides you with comprehensive and current account information, as of the prior day's close of business.

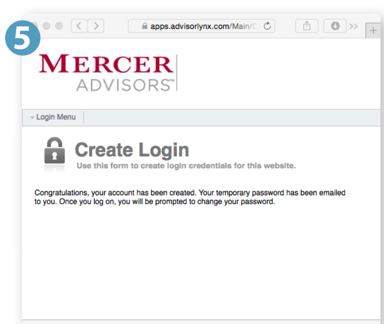
Accessing our Client Portal for the first time? It's quick and easy to do. Follow these easy steps to create your unique login:

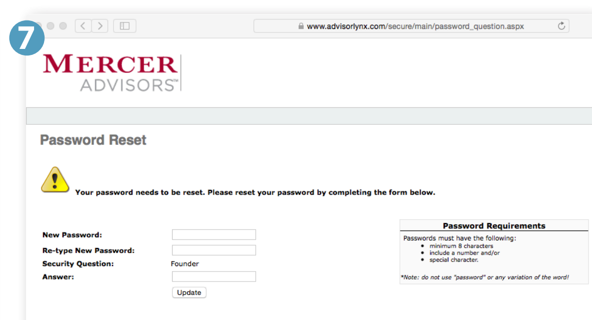
1. Go to **merceradvisors.com** and click on the **Client Login** link located in the upper left corner of the screen.
2. From the **Client Login** screen, click on the **Create login** link at the bottom left of the **Investment Accounts** section.
3. You will be brought to a new **Client Login** screen. You will need your account number and Social Security Number (or Tax Identification Number) associated with the account. Enter this information in the appropriate fields and click on the **Continue** button.
4. On the next screen, you'll be asked to enter a security question and answer, a User ID, and your email address. When finished, click on the **Create Login** button.
5. The confirmation message below will appear, and an email from *noreply@advisorlynx.com*, entitled "Web Registration" will be sent to the email address you provided on the prior screen, confirming your User ID and providing a temporary password. Return to merceradvisors.com and click on the **Client Login** icon again.
6. When the **Client Login** screen appears this time, you'll enter your User ID and temporary password into the appropriate fields. Then click on the **Sign in** button.
7. You will be asked to change your password, confirm it, and answer your security question before you're able to access your account information. Once you've logged in with your unique credentials, your **Portfolio Dashboard** will appear.




From the **Portfolio Dashboard**, you have access to a comprehensive overview of your accounts. This information is updated at the close of each business day – reflecting both your activities and market movement.

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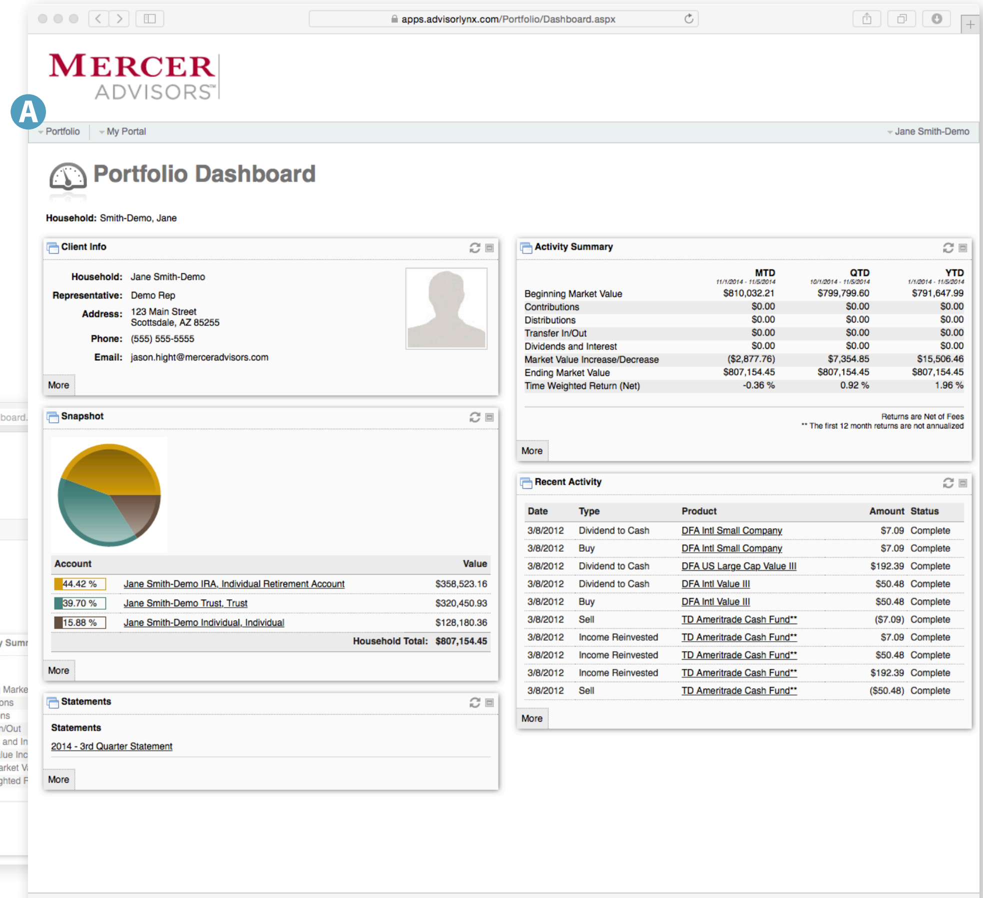
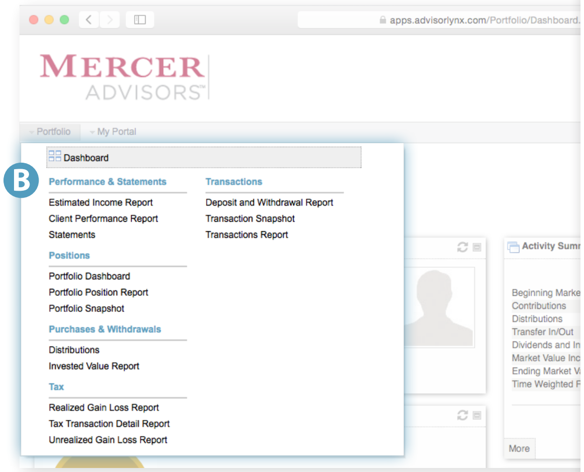
## Exploring the reporting options available within the Client Portal

There are numerous reporting functionalities available to you with a few mouse clicks.

A. Click on the **Portfolio** tab in the upper left corner of your Dashboard.

B. The **drop-down menu** will appear, showing you the various reports you can create to analyze and review your assets.

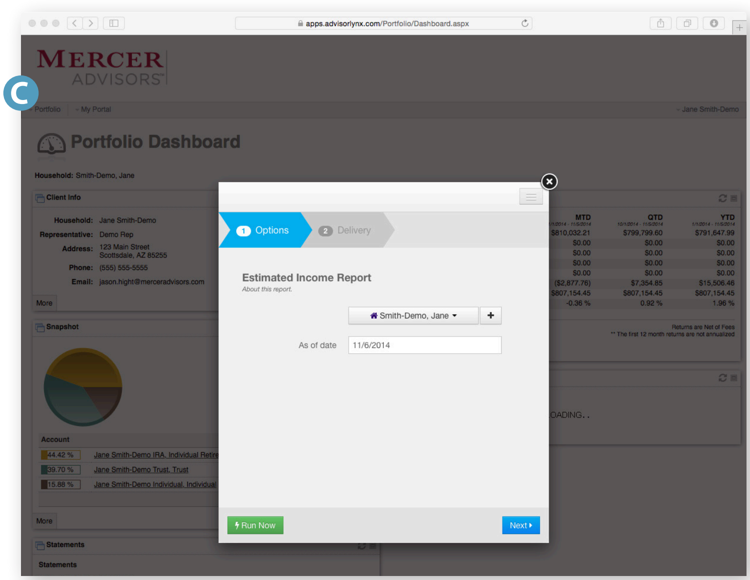


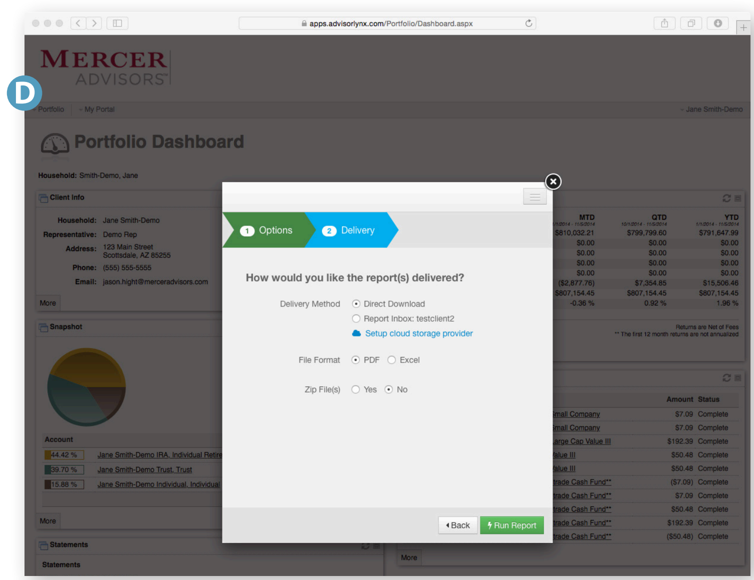




C. Click on any of the reports listed and a new **Options** screen will appear. From here, you are able to select a date range for your report. The default for the Start Date is today's date. To change the date, click on the field and enter your desired start date. Inception date can be applied by clicking on the **Use Inception** button. Click on the **Next** button to proceed to the **Delivery** screen.

D. From this screen, you are able to select the delivery method you prefer. Default parameters are as shown. Click on the **Run Report** button when ready. The report you selected will appear in a new window. You are able to print the report or review it online.

## Running a Report






MERCER ADVISORS™

1801 East Cabrillo Boulevard
Santa Barbara, California 93108
800.898.4642 | merceradvisors.com