Understanding and Using Your Client Web Portal

This page intentionally left blank

Understanding and Using Your Client Web Portal

Overview

The Client Web Portal (CWP) is a secure website your financial advisor can use to keep you updated on your investment accounts. It allows your advisor to post reports and other files to a secure website, to which you both have access. Depending on how your advisor configures the CWP, you might also be able to upload documents (such as account statements, tax information, etc.) to the site for him/her to review.

This document explains the following procedures related to logging into the CWP:

- how to login to the CWP
- what to do if you forget your CWP password
- what to do if you do not receive the e-mail to reset your password
- how to change the e-mail address you use to login to your CWP
- how to change your CWP password, and
- what to do if you no longer have access to the e-mail address you use to log into the CWP.

For any other issue regarding your CWP, please contact your financial advisor directly.

How do I login to the CWP?

How you initially access the CWP depends on the following factors:

- ► If you do not already have a subscription to a Morningstar product (such as Morningstar.com, or one of our Investor Newsletters), your advisor will either require you to set your own password to the CWP, or provide one for you. Even if your advisor provides you with a password, you will need to immediately change this upon first accessing the CWP.
- ► If you already have a subscription to a Morningstar product (such as Morningstar.com, or one of our Investor Newsletters), your advisor can use the same e-mail address you use to login to that product. Likewise, you should use the same password you use to login to the Morningstar product/website.
- ► If the password you created for the Morningstar product does not conform to the security standards on the CWP (see the bulleted list under step 4 on the following page for a description of the standards), you will have to change the password on the original product, then return to the CWP and login with the new password.

Once your advisor sets up your Client Web Portal, you will receive at least one e-mail with your log in information, similar to one of the following two examples:

> Dear David Ott,
>
> Below is a link to your personal Client Web Portal Reports. If you have not previously created a Morningstar login, you will receive a second email with instructions on setting up a password for the portal. You should follow the link in that email and establish a password before clicking the link below. If you already have a Morningstar password, click the link below and enter your password.
>
> https://cwp.morningstar.com/
>
> Be sure to bookmark this link for future reference. If clicking on the link does not work, you can copy and paste the address into your browser.
>
> This page will prompt you to log in to the Client Web Portal.

If you receive this email, you will receive another one (shown below), directing you to create a password for use with the CWP

> Dear Morningstar Member,
>
> Please click on the link below to create a new Morningstar password.
>
> https://admainnew.morningstar.com/register/register.aspx?page=ChangePwd&pwec=66NON90404LN
>
> If clicking on the link doesn't seem to work, you can copy and paste the link into your browser's address window, or retype it there. This page will give you instructions for resetting your password.
>
> Sincerely,
>
> Morningstar Product Support

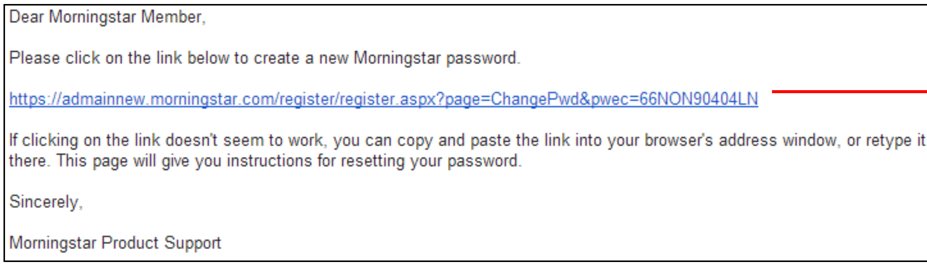
Use the link in this email to create a password you can use when logging into the CWP

> Dear Leo Murphy,
>
> Below is a link to your personal Client Web Portal Reports.
> You can login with your email address as your login name and [Advisor Assigned Password] as your password.
>
> https://cwp.morningstar.com/
>
> Be sure to bookmark this link for future reference. If clicking on the link does not work, you can copy and paste the address into your browser.
>
> This page will prompt you to log in to the Client Web Portal.
>
> We strongly advise you to change your password immediately after you log in the first time to a new unique password that meets our security standards.

Note that this version of the email contains a pasword for you already

If you received the version of the email from your advisor that lacks a password, do the following:

1. Open the e-mail with **Your New Morningstar Password** as the Subject line.
2. Click the **link** embedded within the e-mail.


Dear Morningstar Member,

Please click on the link below to create a new Morningstar password.

https://admainnew.morningstar.com/register/register.aspx?page=ChangePwd&pwec=66NON90404LN

If clicking on the link doesn't seem to work, you can copy and paste the link into your browser's address window, or retype it there. This page will give you instructions for resetting your password.

Sincerely,

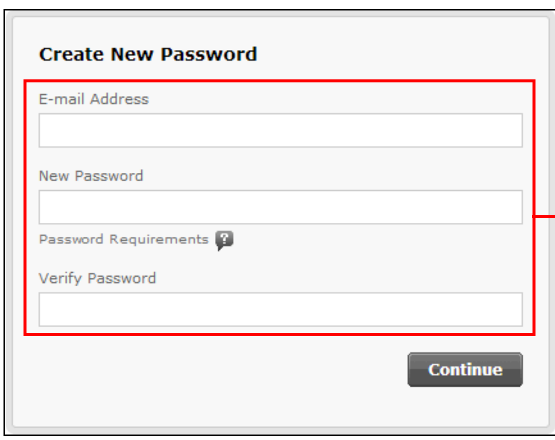
Morningstar Product Support

Use the link in this email to create a password you can use when logging into the CWP

3. In the **E-mail Address** field, enter the **e-mail address** to which the CWP email was sent. The first time you log in, the Create New Password dialog box opens, prompting you to set up your own password.
4. In the **New Password** and **Verify Password** fields, enter a new **password** that meets the following criteria:

☞ Note: The password you create is case sensitive.

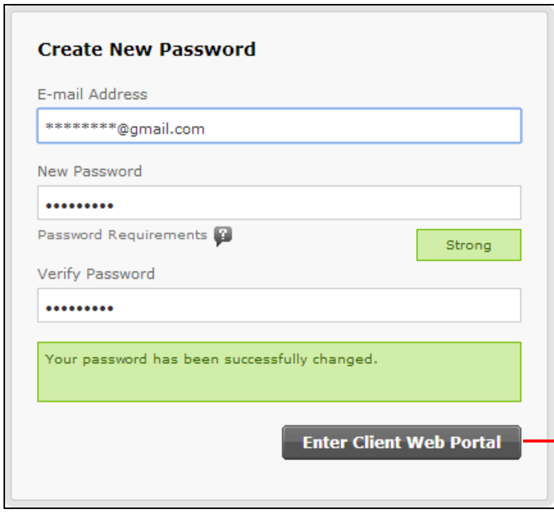
- ► it must be 8 to 16 characters long
- ► it must contain numbers
- ► it must contain lower and uppercase letters
- ► it is allowed to contain the following symbols: !@#$%^*?_~
- ► it cannot contain sequential character strings like “abcd”
- ► it cannot contain part of you login e-mail address, and
- ► it cannot contain the word “Morningstar.”



Fill out these three fields

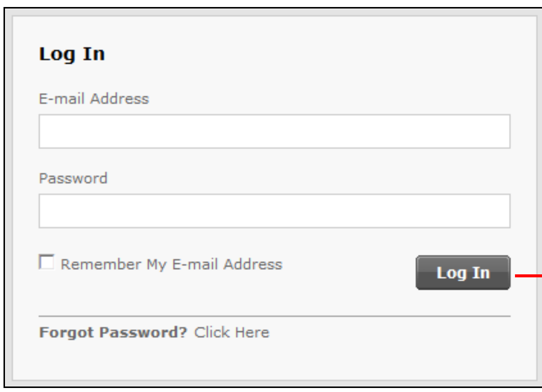
5. Click **Continue**.

6. Click **Enter Client Web Portal**. You are returned to the main log in screen.



After entering your e-mail address and a password, click this button

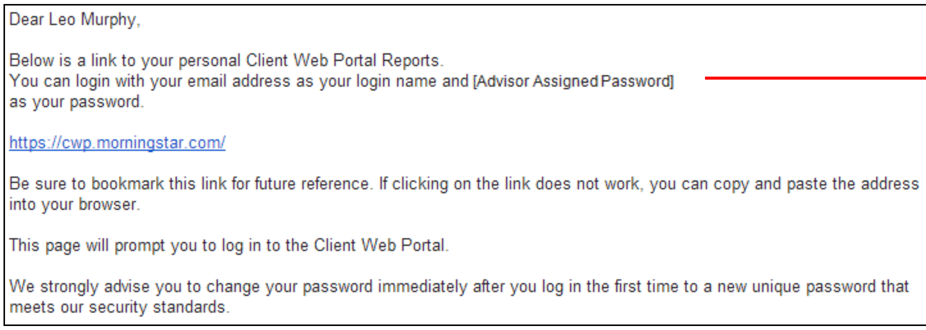
7. Login using your **e-mail address** and the **password** you just created.



Enter your e-mail address and password, then click Log In

If you receive the version of the e-mail with the password included, do the following:

1. Open the e-mail with **Your New Morningstar Password** as the Subject line.
2. Click the **link** embedded within the e-mail. You are brought to the CWP log in page.


Dear Leo Murphy,

Below is a link to your personal Client Web Portal Reports.
You can login with your email address as your login name and [Advisor Assigned Password]
as your password.

https://cwp.morningstar.com/

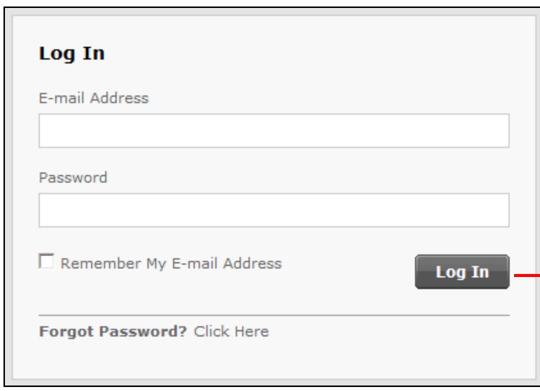
Be sure to bookmark this link for future reference. If clicking on the link does not work, you can copy and paste the address into your browser.

This page will prompt you to log in to the Client Web Portal.

We strongly advise you to change your password immediately after you log in the first time to a new unique password that meets our security standards.

Note that this version of the e-mail contains a password for you already

3. In the **E-mail Address** field, enter the **e-mail address** you use to login to the CWP.
4. In the **Current password** field, enter the **password** your advisor provided in the email.
5. Click **Log In**. You are brought to a new page, where you need to create a new password.

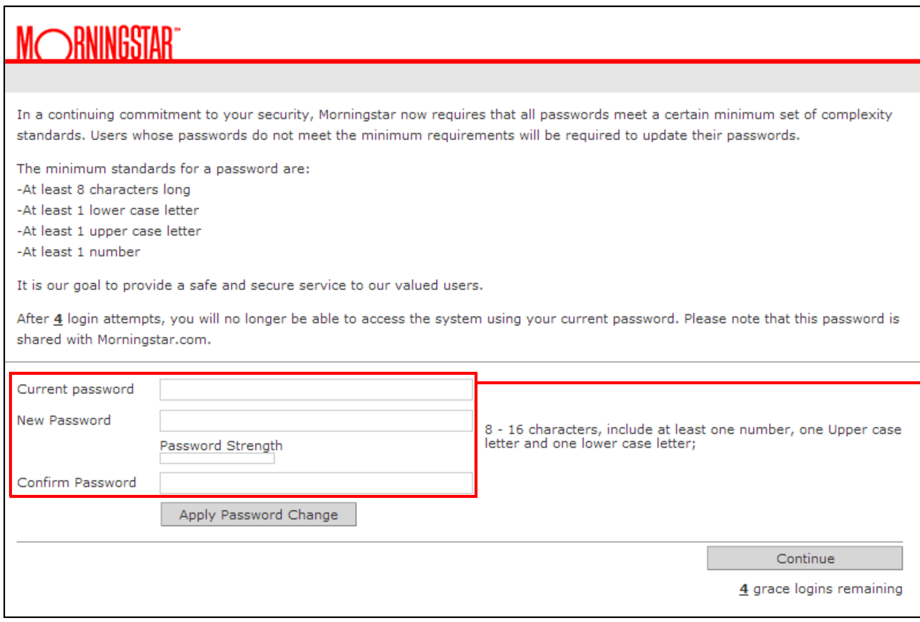


Enter your e-mail address and password, then click Log In

6. In the **Current password** field, enter the **password** sent by your advisor.
7. In the and **New Password** and **Current Password** fields, enter a new **password** that meets the following criteria:

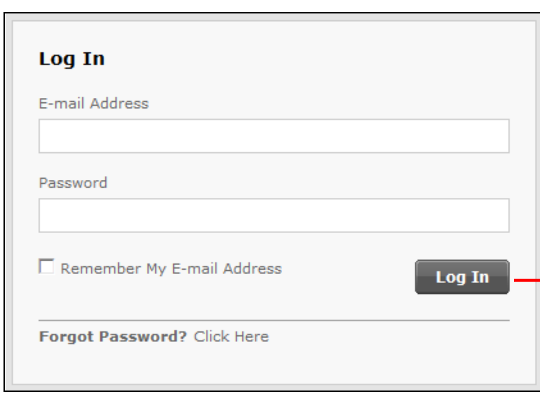
   ☞ Note: The password you create is case sensitive.

   ▶ it must be 8 to 16 characters long
   ▶ it must contain numbers
   ▶ it must contain lower and uppercase letters
   ▶ it is allowed to contain the following symbols: !@#$%^*?_~
   ▶ it cannot contain sequential character strings like “abcd”
   ▶ it cannot contain part of you login e-mail address, and
   ▶ it cannot contain the word “Morningstar.”



Fill out these fields

8. Click **Apply Password Change**. You are returned to the main log in screen.
9. Login using your **e-mail address** and the **password** you just created.
10. Click **Log In**.



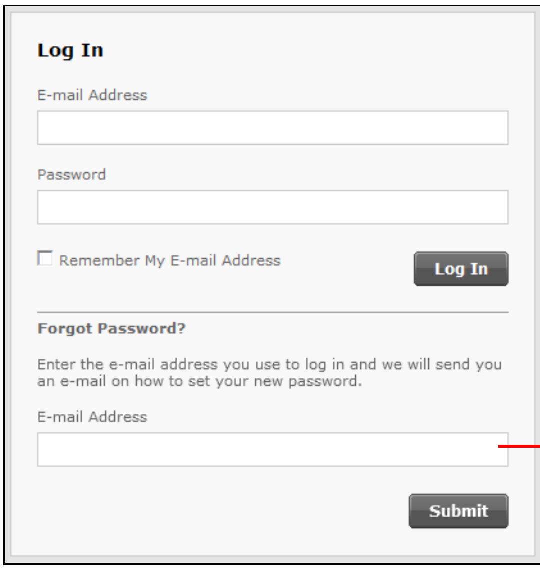
Enter your e-mail address and password, then click Log In

What do I do if I forget my password?

Note that after five consecutive failed login attempts, you will be locked out of the CWP. You will see a warning message that the account is locked, and the "Forgot Password" link on the CWP login page is deactivated. If this happens, you must contact your advisor, who will in turn contact Morningstar Office Product Support to unlock the CWP.

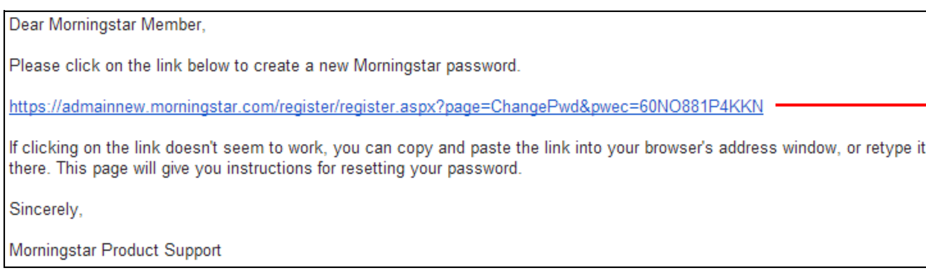
Therefore, if you forget your password to the CWP, instead of continuing to guess at it, do the following:

1. Go to https://cwp.morningstar.com.
2. Click the **Forgot Password? Click Here** link.
3. In the **E-mail Address** field that appears, enter your **e-mail address**.



If you've forgotten your password, enter your e-mail address here, then click Submit to reset it

4. Click **Submit**. You will receive an e-mail similar to the one shown below.



Dear Morningstar Member,

Please click on the link below to create a new Morningstar password.

https://admainnew.morningstar.com/register/register.aspx?page=ChangePwd&pwec=60NO881P4KKN

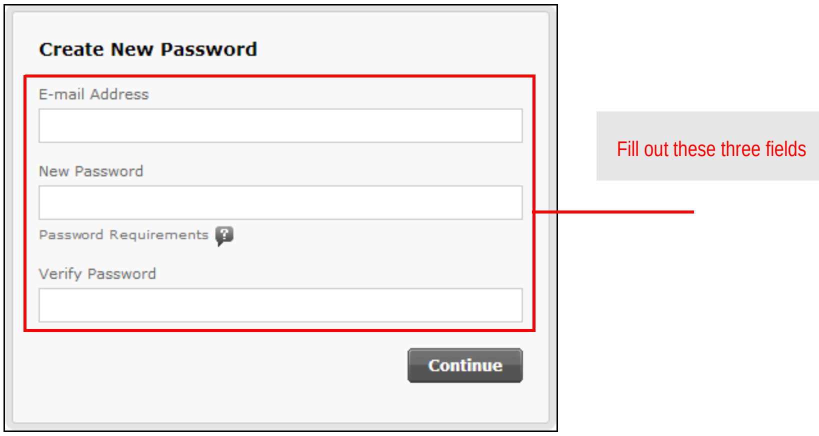
If clicking on the link doesn't seem to work, you can copy and paste the link into your browser's address window, or retype it there. This page will give you instructions for resetting your password.

Sincerely,

Morningstar Product Support

Use the link in this email to create a password you can use when logging into the CWP

5. Click the **link** in the e-mail. (You can also copy and paste the link into any Internet browser's Address field). You are brought to the following page.



6. In the **E-mail Address** field, enter the **e-mail address** you use to login to the CWP. The first time you log in, the Create New Password dialog box opens, prompting you to set up your own password.
7. In the **New Password** and **Verify Password** fields, enter a new **password** that meets the following criteria:

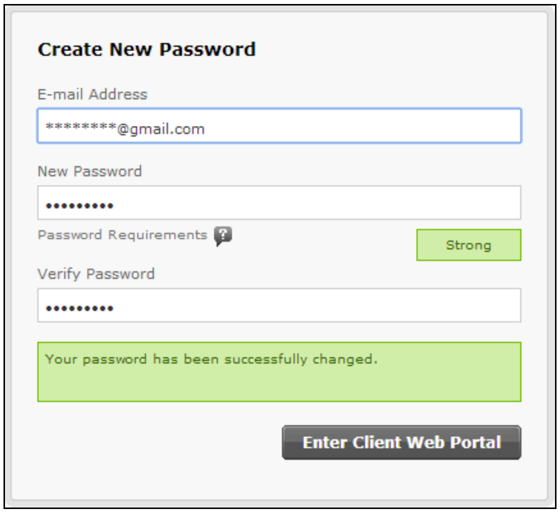
☞ Note: The password you create is case sensitive.

- ► it must be 8 to 16 characters long
- ► it must contain numbers
- ► it is allowed to contain the following symbols: !@#$%^*?_~
- ► it must contain lower and uppercase letters
- ► it cannot contain sequential character strings like "abcd"
- ► it cannot contain part of you login e-mail address, and
- ► it cannot contain the word "Morningstar."

8. Click **Continue**. A confirmation message appears in green.

   ☞ Note: If the password does not meet the criteria listed above, you will see a red error message when you click Continue. If you enter the incorrect e-mail address (be sure to spell it correctly), you will also see a red error message when clicking Continue.

9. Click Enter **Client Web Portal**. You are returned to the normal log in screen.



10. Enter your **e-mail address** and the **password** you just created, then click **Log In**.

What if I do not receive the e-mail to reset my password?

Be sure to check your Spam and Junk folders for the reset e-mail. It will come from mailing1@mail.morningstar.net with the subject of "Your New Morningstar Password."

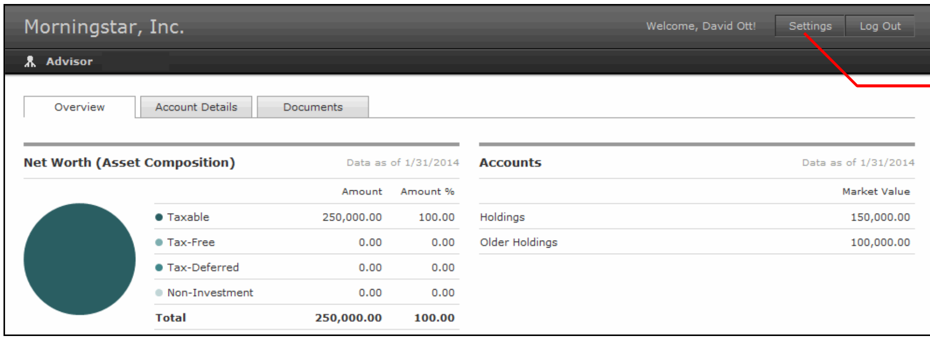
If the e-mail does not arrive, it could also mean that your account is locked and you need to contact your financial advisor for assistance.

You have five attempts to log in. For security purposes, if you attempt to log in five times and are unsuccessful, you will be locked out, and your financial advisor will have to contact Morningstar's Support team in order for you to access the CWP again.

How do I change my CWP e-mail address?

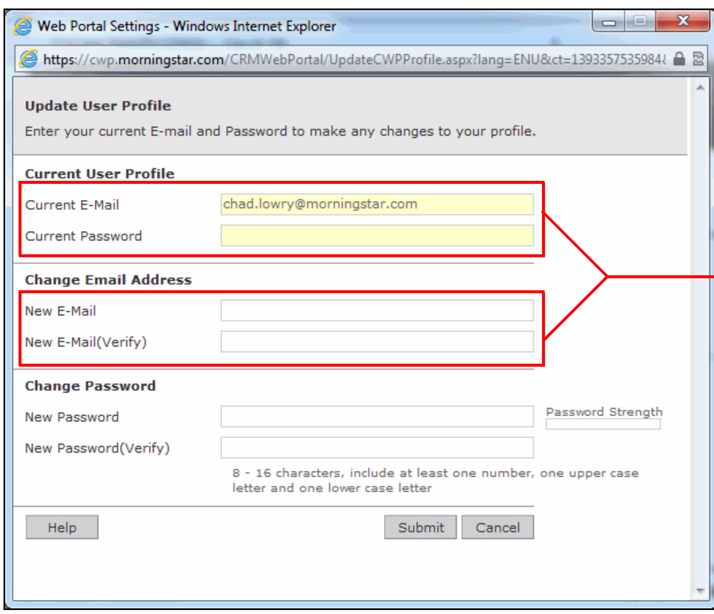
To change the e-mail address associated with your CWP, do the following:

1. Go to https://cwp.morningstar.com.
2. Login to the CWP.
3. In the upper-right corner of the screen, click **Settings**. The Update User Profile window opens.



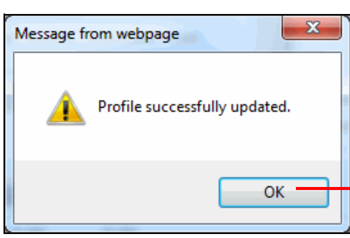
Click this button once

4. Fill out the following fields:
   - **Current E-mail**
   - **Current Password**
   - **New E-mail**, and
   - **New E-mail(Verify)**.



Fill out these fields

5. Click **Submit**. Once the e-mail is successfully changed, the following message opens:



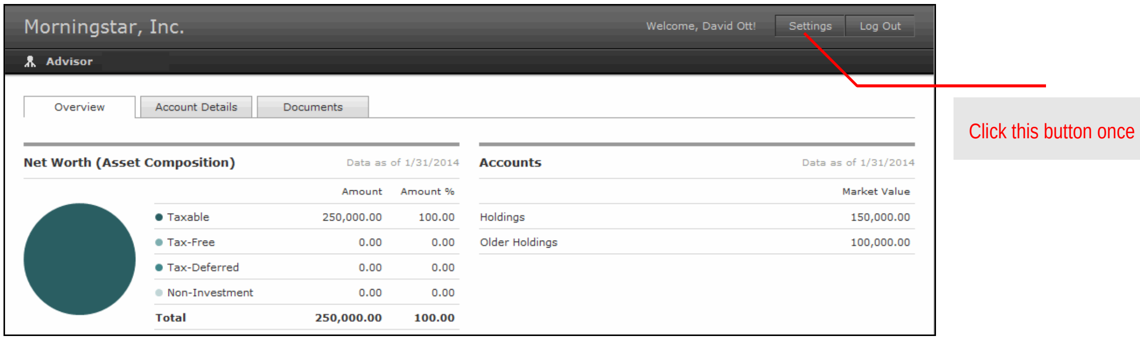
Click here to clear this message

6. Click **OK** to clear the message.

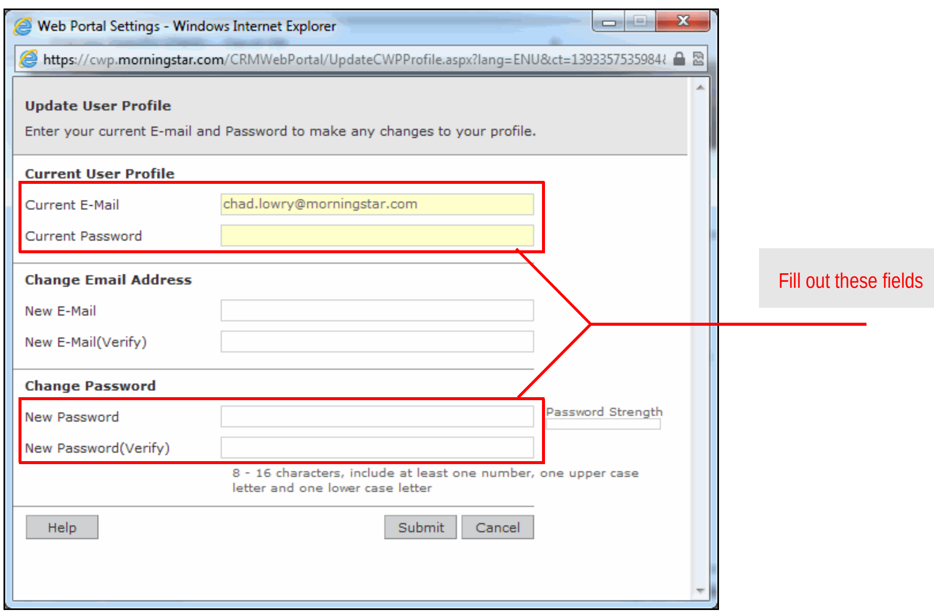
How do I change my CWP password?

To change the password you use to login to the Client Web Portal, do the following:

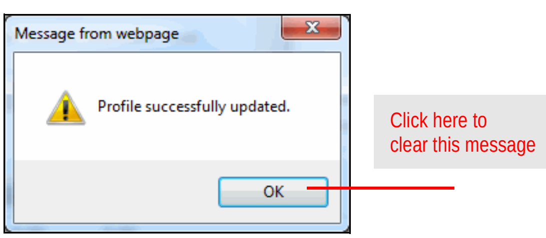
1. Go to https://cwp.morningstar.com.
2. Login to the CWP.
3. In the upper-right corner of the screen, click **Settings**. The Update User Profile window opens.



4. Fill out the following fields:
   - **Current E-mail**
   - **Current Password**
   - **New Password**, and
   - **New Password(Verify)**.



5. Click **Submit**. When the password is changed, the following message opens:



6. Click **OK** to clear the message.

What if I no longer have access to the e-mail address I use to log into my web portal?

If you are still able to log in to the web portal, please change your e-mail address via the instructions provided on page 10.

If you no longer have access to your e-mail and are not able to log in the web portal, please contact your financial advisor for assistance.