


GET ONLINE ACCESS USER REFERENCE GUIDE


1 . Accept the Agreement


On the **Accept the Agreement** page, check the *"I have read and understood the agreement."* box and select **Accept** to proceed to the next step.


Note: New users will see indicators at the top of the page change from grey to green as they move successfully through the process.


Get Online Access



Accept Agreement


Identify Account


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Accept the Agreement

I have read, understand, and accept the terms and conditions set forth below, by selecting the "Accept" option below. NOTE: ACCESSING OR REQUESTING ACCOUNT INFORMATION OR TRANSACTIONS THROUGH THIS SITE CONSTITUTES AND SHALL BE DEEMED TO BE AN ACCEPTANCE OF THE FOLLOWING TERMS AND CONDITIONS, WHICH CONSTITUTES A LEGAL AGREEMENT BETWEEN MYSELF AND XYZ FUNDS.

1. Online Services. This Agreement ("Agreement") between me and XYZ Funds (the "Fund") sets forth the terms on which I am permitted to use the Online Services. The words "I", "my" and "me" in this Agreement mean each person who has an interest in the Fund account, that is accessible through the Online Services and any person authorized to have such access. Online Services, for purposes of this Agreement, includes the online services currently offered and that may be offered in the future by the Fund for mutual fund transactions and account inquiry, and any other online system made available to the Fund shareholders by the Fund or its affiliates, agents or service providers. The Online Services permit me to transmit electronically requests to buy, redeem and exchange shares of the Fund. These services are available for use with compatible personal, home, or small business computers with modems that can connect to the Internet.
2. Agreement Governs. I will use the Online Services only on the terms set forth in this Agreement.
3. Sole User. I will be the only authorized user of the Online Services under this Agreement and I will not make the Online Services available to anyone else. I will keep my security code(s) and other security information (all such codes and information, "security information") confidential. I will be solely responsible for all requests for transactions and information (and the use of the information) transmitted through the Online Services using my security information. The Fund is not obligated to

☒ I have read and understood the agreement.

You can proceed only if you accept the terms and conditions

Accept Cancel

2. Identify Your Account

Next, complete the **Identify Your Account** page.

Only one account associated with the Tax ID is required.

Complete the following fields:

- > First Name / Last Name
- > ID Type – select SSN or EIN from the pop-up bubble
- > SSN or EIN Number
- > Account Number
- > Zip Code
(Foreign address accounts use 00000)
- > Email Address

Click [Continue](#) to proceed to the next step or [Cancel](#) to return to the **Log In** page.

Get Online Access

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✕

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Identify Your Account

To get online access, you must identify your account

First Name *

Middle Initial

Last Name *

ID Type *

Number *

SSN

EIN

Account Number *

Zip Code *

e.g. 06122

Email *

This email address will be used for occasional communications from the system

Continue

Cancel

An error message displays when the identifiers entered do not match existing records. Data may have been input incorrectly or further assistance may be required. A customer service representative can assist.

✓

✎

✕

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Accept

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Create

We are unable to find the account with the details you provided. Please check and try again. If you need further assistance, please speak with a Customer Service Representative.

Close

3. Confirm Your Identity

To proceed, **Confirm Identity**.

When the data is a match, the **Confirm Your Identity** page displays.

A one-time passcode (OTP) is simultaneously sent to you via email, using the address entered in Step 2.

OTP received via email from notify@accessportals.com.

The passcode, which expires twenty minutes after receipt, must be entered on the **Confirm Your Identity** page before you can proceed. There is a useful expiration timer included and an option to “Resend OTP” should a new passcode be required.

Note: If the user clicks [Resend OTP](#), a message alerts the user to expect a new passcode email.

The user enters the new passcode and clicks [Continue](#) to proceed or [Cancel](#) to return to the **Log In** page.

The One Time Passcode you entered is invalid or 20 minutes has elapsed since the passcode was generated. [Close](#)

Another One Time Passcode has been sent. [Close](#)

4. Set Up Your Profile

Enter your address, including street and city.

Scroll to select the state.

The zip code carries over from **Identify Your Account**.

There is an opportunity to add a mobile phone number enabling SMS messaging. The option defaults to **Yes**; you must select **No** to not provide a mobile number.

Note: Providing a mobile phone number gives authorization for the delivery of temporary passcodes and occasional communications. Authentication by text is often more immediate than email authentication, which typically depends on email provider speed. The user is responsible for any charges from the mobile phone service provider that these text messages might incur.

Complete all fields, and click **Continue** to proceed or **Cancel** to return to the **Log In** page.

Get Online Access

✓ Accept Agreement

✓ Identify Account

✓ Confirm Identity

✎ Set Up Profile

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Set Up Your Profile

Please enter the following information to set up your profile.

Adding your mobile number gives you a choice in where the system may send occasional communications (e.g., One Time Passcode, User Profile Updates).

BNYM A TEST
*****.*****@*****.com


Street Address *

e.g., 123 Main St, Apt 3

City * State * Zip Code *

e.g. 08123

Would you like to use your mobile number?

☒ **Yes** ☐ **No** 

Country Code * Mobile Number *

United States (1)

Message and data rates may apply

Continue **Cancel**

5. Review Your Information

Confirm that the Profile information has been accurately entered.

The [Edit](#) option allows you to make any corrections by returning to **Set Up Your Profile** where necessary changes to the Profile information can be made. Alternatively, click [Back](#) to make updates.

Once all fields are confirmed, click [Continue](#) to proceed or [Cancel](#) to return to the **Log In** page.

Get Online Access

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Accept Agreement

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Identify Account

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Confirm Identity

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Set Up Profile

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Create Login

Review Your Information

Please confirm that your information is correct.

Profile

Name

Home Address

Email

Mobile Number
United States (1) 508-

→

Edit

Back

Continue

Cancel

6. Create Your Login

The final step is to **Create Your Login**.

Create your own User ID and Password, adhering to the parameters provided.

The requirements change from grey to green as accepted entries are made.

To change information on this page prior to clicking **Submit**:

- > User ID
 - remove all entries and re-enter
- > Password
 - remove the password entries, re-enter, and verify

Click **Submit** to complete the **Get Online Access** process.

Get Online Access

✓

Accept Agreement

✓

Identify Account

✓

Confirm Identity

✓

Set Up Profile

✓

Review Information

✎

Create Login

Create Your Login

Please create a User ID and Password for accessing the system.

User ID *

✓ At least 8 characters long

✓ Can only contain these special characters: - . _

Password *

••••••••

Minimum 8 Characters

✓ Uppercase (A-Z) character

✓ Lowercase (a-z) character

✓ Numeric (0-9) character

✓ Special character

~ ` ! @ # \$ % ^ & * () - _ = + [] { ; : , < > | / ?

✓ At least 8 characters long

Verify Password *

••••••••

Back

Submit

Cancel

Shortly after completing the process, you will receive notification via email confirming successful registration.

You will be returned to the **Log In** page and need to proceed through the login process to access your online account.

Online Access Registration Complete

N

notify@accessportals.com

To

Your registration is complete. You can log into your online account using the username and password you selected during the registration process.

If you did not initiate this registration or need additional support please contact help desk.