Premier Miton
INVESTORS

FEBRUARY 2022

Premier Portfolio Management Service

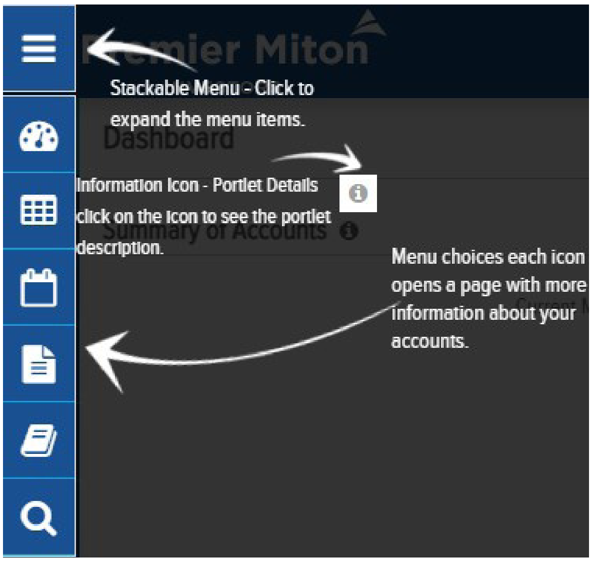
Online Valuation Service: user guide for investors

FOR INVESTORS IN THE PREMIER PORTFOLIO MANAGEMENT SERVICE

This document is designed to guide you through some of the key functionality of the Premier Portfolio Management Service online valuation service.

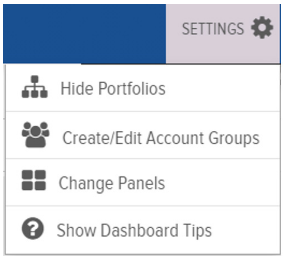
1. Standard functionality

When you first log in you will automatically see the dashboard tips, showing you how to navigate the portal.



2a. Settings

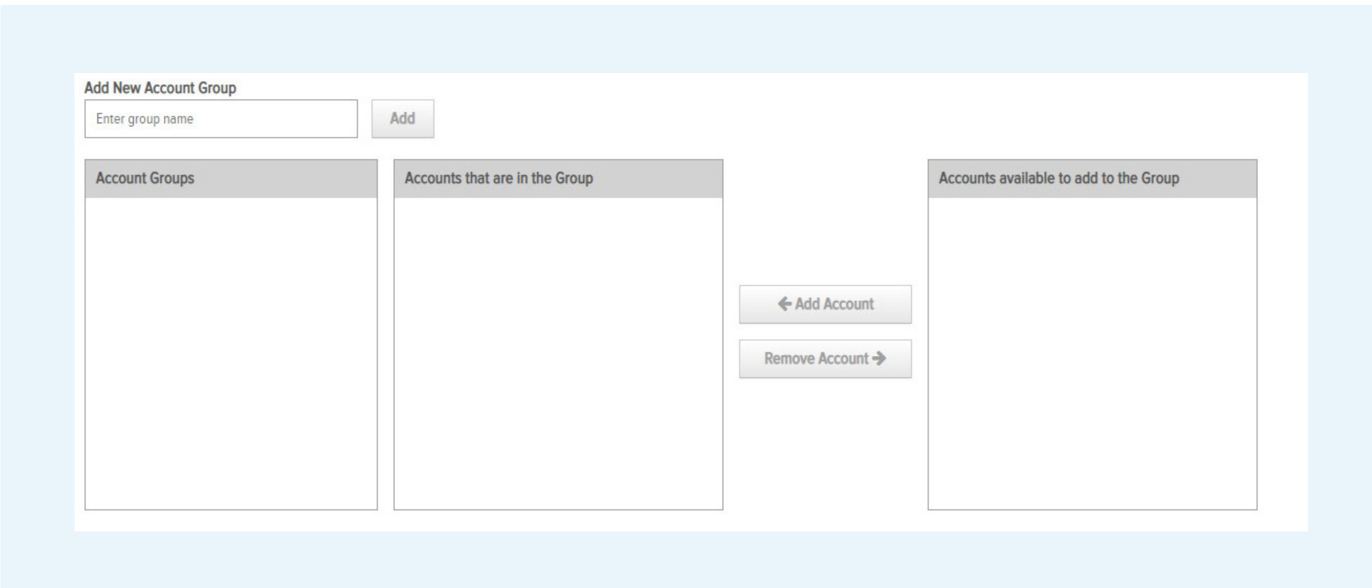
Settings is the first icon of the group at the top right corner of the site. Within
settings, you can show/hide your portfolios, create & edit account groups, customise the panels on the dashboard and see the dashboard tips again.



2a.i. Create & Edit Account Groups

If you have multiple accounts with the Premier Portfolio Management Service, you can create custom groups to organise them in a way that is more beneficial to you. You can use the options to create and name a new group, and add each account as necessary.

Account groups are then displayed in the Account Selector within the site.



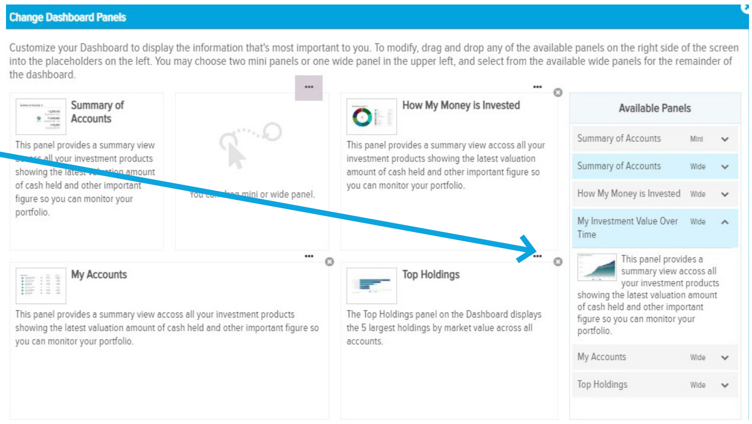
2a.ii. Change Panels

If you wish to customise the dashboard, click the Change Panels button to open up a prompt window.

This window will show your active panels on the left, and the available panels to select from on the right.

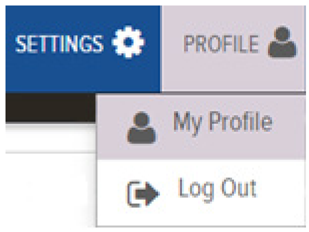
To remove any panels, you can click the X in the top right of each box.

To add one of the available panels, simply click the blue box and drag this over to the chosen panel area. Whilst dragging the panel, a dotted outline will appear to show you the areas this can be moved to.



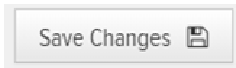
2b. Profile

Clicking the **Profile** button will allow you to view your profile or **log out** from the portal.



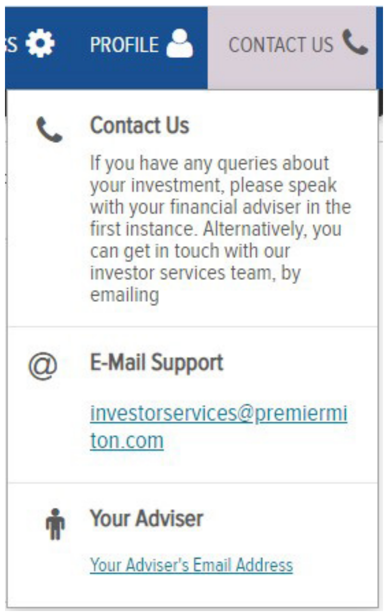
From your profile, you will be able to review your personal details, edit the email address associated with your online account and amend your correspondence delivery methods.

When making any changes to the email address or delivery methods, ensure you click the **Save Changes** button in the bottom right of the page.



2c. Contact Us

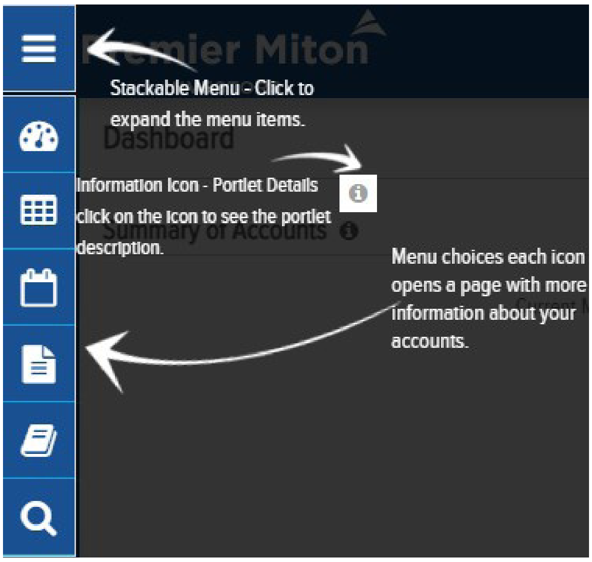
Clicking the **Contact Us** button will show Premier Miton's contact details, as well as your adviser's email address.



3. Account Views

Using the navigation pane in the top left, you can access different areas of your account:

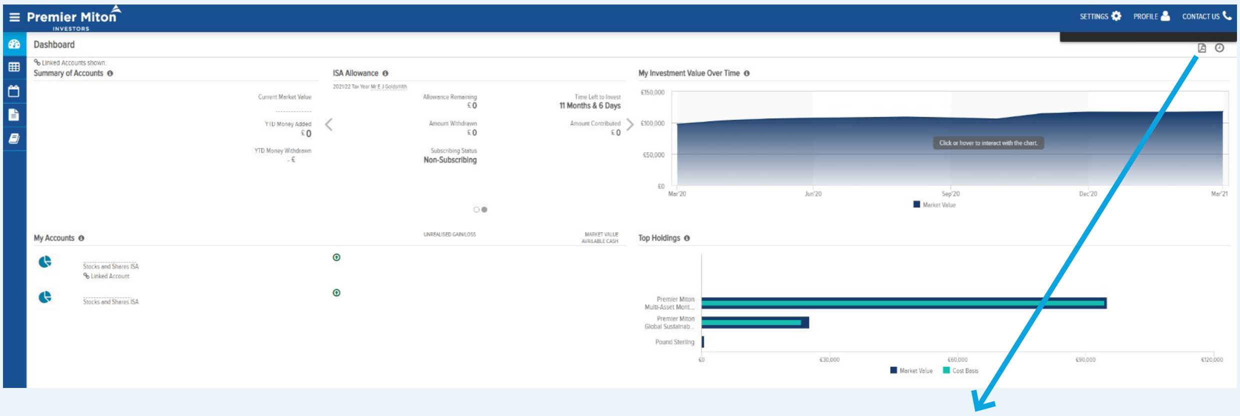
- Dashboard
- Investments
- Activity
- Documents
- Glossary



3a. Dashboard

The dashboard page features information about your accounts: ISA details, account summary with information including unrealised gains and losses and top holdings.

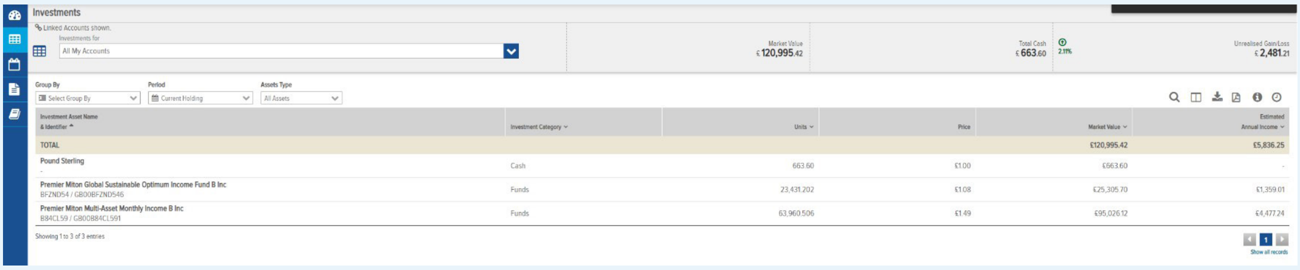
You can customise the information shown by editing the panels. To do this, follow step 2a.ii.



You can also download a copy of the dashboard by clicking the PDF button in the top right.

3b. Investments

The **Investment** screen shows a more detailed view of your holdings. From here, you can view each of your portfolios funds, filter for select accounts, change the grouping of the holdings and change the valuation date.

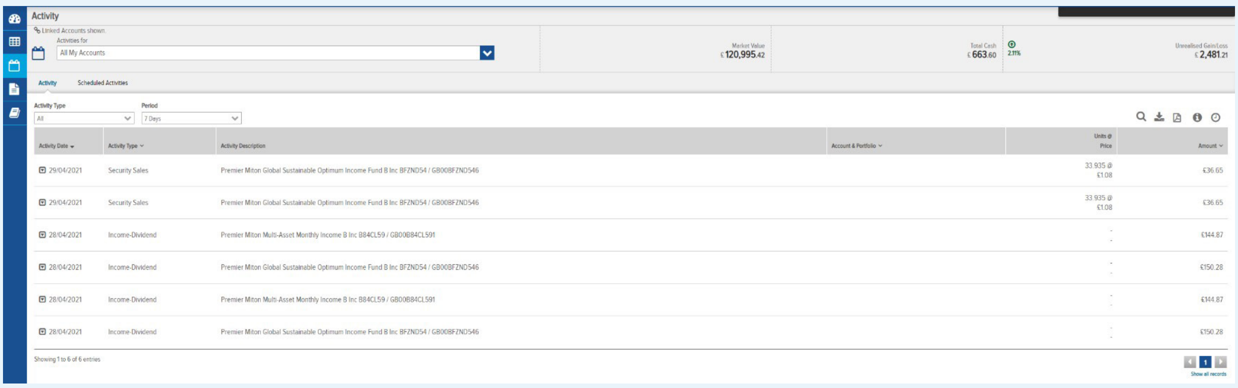


The buttons to the top right of the page can also be used for further analysis or customisation.

- **Search** – filter the table for chosen criteria, e.g. fund name
- **Table Customisation** – to customise the columns of the table
- **Export** – to export the data as an Excel file
- **Download PDF** – to export the data as a PDF file
- **Information** – to open a glossary window for further information
- **Clock** – this shows when the data was last updated. The data is updated in real-time.

3c. Activity

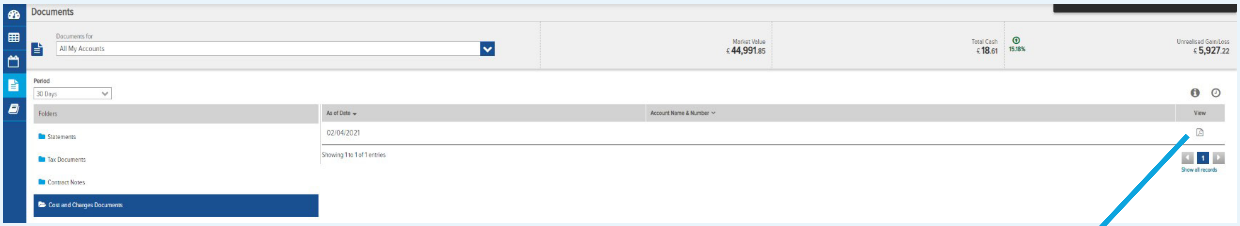
The **activity** screen shows a transaction history of your accounts, depending on the time period selected. To change the time period, select the Period drop down and chose an option.



Clicking the buttons in the top right will allow you to customise the table further, or download an Excel/PDF file.

3d. Documents

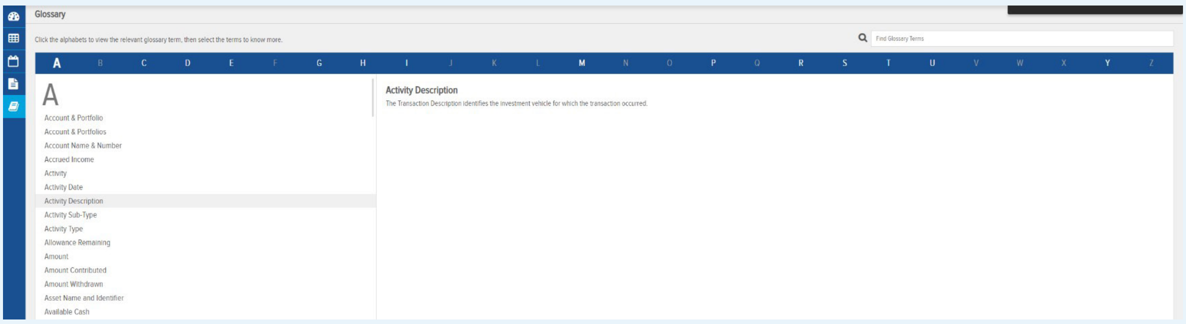
The **documents** page can be used to view and download your account documents. These include quarterly statements, annual tax packs and costs and charges statements. By editing the time period to **previous year**, or setting a **custom date range**, earlier documents may be listed.



You can then view and download the documents by clicking the PDF button on the right.

3e. Glossary

The **glossary** page shows the terminology of the online valuation service (OVS)



Contact us

For further assistance with using the Online Valuation Service please contact
Investor Services on **0333 456 11 22** or via **investorservices@premiermiton.com**

For your protection, calls may be recorded and monitored for quality assurance and training purposes.

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