

# JM FINN

Investment | Wealth



# Third Party JM Finn Portal Guide

---

User guide for your JM Finn online account

## Welcome to the JM Finn client portal

**An online portfolio valuation tool that meets  
the requirements of today's investor.**

Living up to our goal of delivering a personal, relationship-driven service requires an online portfolio valuation tool that meets the requirements of today's investor.

Having been one of the pioneers in developing a proprietary online tool for our clients, we are in the fortunate position of being able to update according to our clients' needs. By not having an off-the-shelf solution we are able to keep the tool current and relevant.

Access our online valuation tool today.





# Contents

- 4 Register
- 6 Login
- 7 Third party documents
- 8 Settings
- 9 Accessing more Information
- 10 FAQs

---

## Register (accessing for the first time)

If you are not currently registered for online access then please navigate to the preferred web browser, navigate to the JM Finn website at [www.jmfinn.com](http://www.jmfinn.com) and click on the login button on the top right of the screen. Enter your username and password and click the Login button.

You will be asked to input three specified digits of your PIN. This is the 6 digit PIN that was sent to your registered postal address with your username.

You will then be prompted to change your temporary password. This should be changed to something memorable to you that has between 8 and 15 characters with letters and numbers. No special characters are required. Please memorise this password – we recommend that you do not write it down.

### Change password

For security reasons we require you to change your password. Please enter new password and confirm password below.

When changing your password, the new password must meet the following criteria:

- Minimum number of characters: 7
- Maximum number of characters: 15
- Contain at least one upper case character
- Contain at least one lower case character
- Contain at least one number

Please create a password

Please confirm your password

Next

You will then be prompted to change your temporary PIN. This should be changed to something memorable to you that is 6 numbers. Please memorise this password – we recommend that you do not write it down.

### Change PIN

For security reasons we require you to change your PIN and securely retain this for your records. Your new PIN must meet the following criteria:

- Cannot use the same digit more than 2 times consecutively - e.g. 111222 or 123888
- Cannot consist entirely of sequential digits - e.g. 123456 or 876543

Confirm new PIN

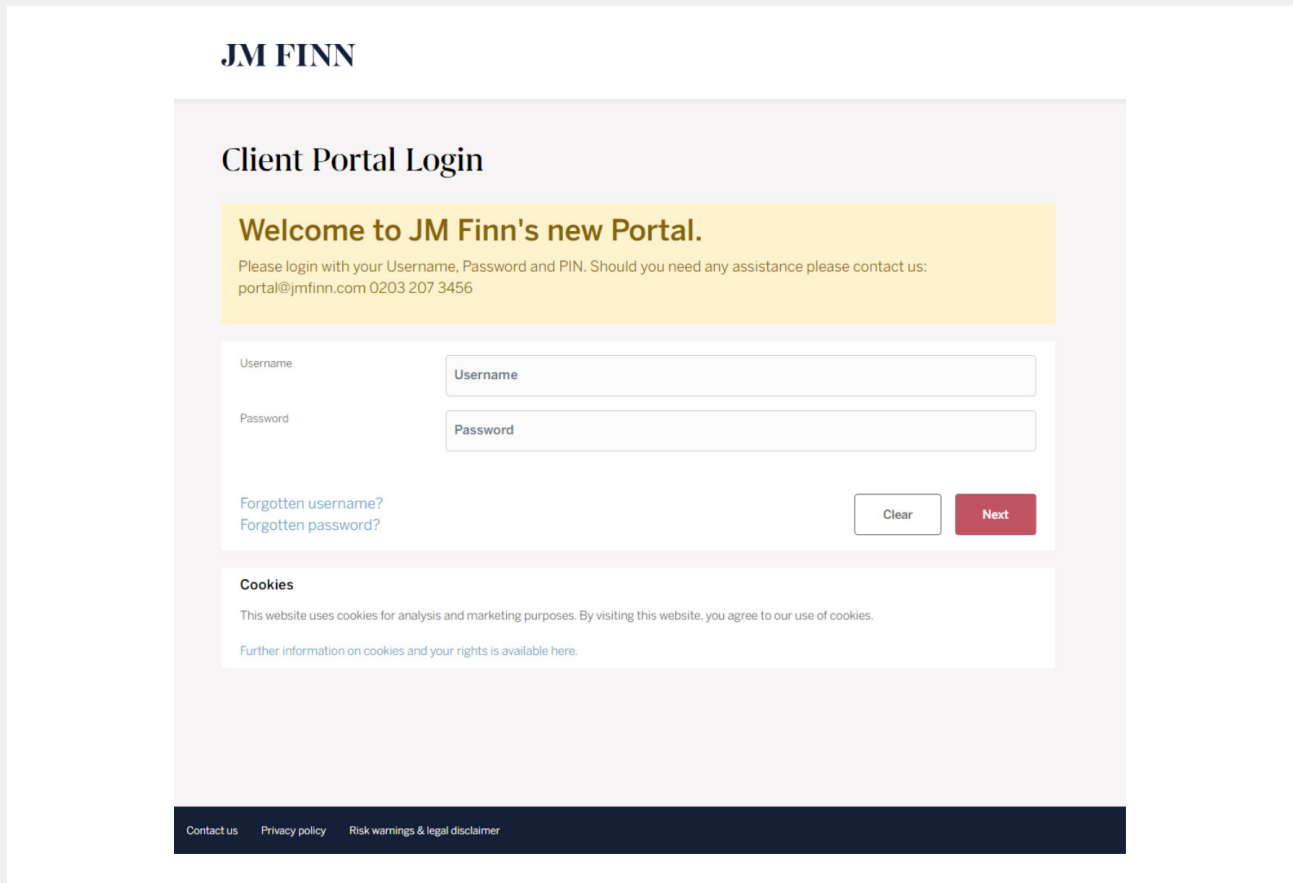
—————		
1	2	3
4	5	6
7	8	9
0	∞	

Restart

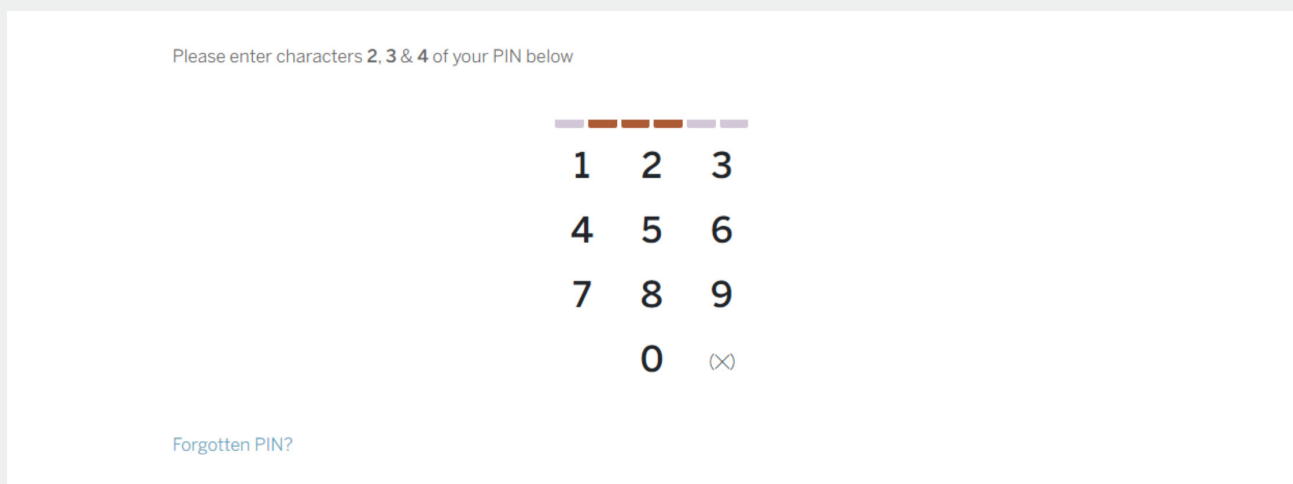
Once you have followed the initial set up process and have activated your online account, you can log in to your account to view your portfolio at <https://www.jmfinn.com> or <https://valuations.jmfinn.com>. To log in, you will need your Username, Password and PIN.

## Login (accessing after you have already logged in once)

To login to the JM Finn Portal you will need your Username, Password and PIN. Should you require any assistance with this information, please do not hesitate to contact us.



You will be asked for three digits of your PIN, this will be different every time.



## Third party documents

After logging in, you will find the 3rd-party documents. This contains documents that you have access to for your clients through JM Finn. Documents are stored on the Portal for 3 years.

**3rd-party documents**

**Filter by Date**

One day | **Last month** | Last 6 months | Last 12 months | ALL | Custom

Date from:  Date to:

**Filter documents**

All | Contract Notes | Cost Disclosure | Custody Statements | Depreciation Reports | Historic Attachments | Invoices | Other

Statements | Tax Reports | Valuations | Wealth Planner

Unread only

**Client List**

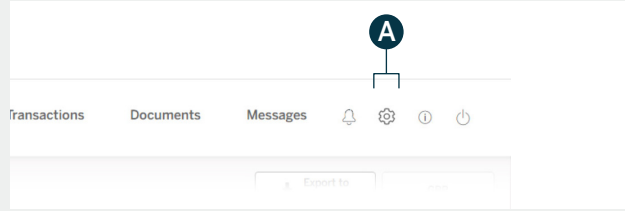
Name:

Type	Entity ref	Name	Date	Read
.PDF	DEMO INTERNET CLIENT	Custody Statements Custody (250120231341220640) January 2023	25/01/2023	<input type="button" value="New"/>
.PDF	DEMO INTERNET CLIENT	Custody Statements Custody (250120231341220640) January 2023	25/01/2023	<input type="button" value="New"/>
.PDF	DEMO INTERNET CLIENT	Custody Statements Custody (250120231341220640) January 2023	25/01/2023	<input type="button" value="New"/>
.PDF	DEMO INTERNET CLIENT	Custody Statements Custody (250120231341220640) January 2023	25/01/2023	<input type="button" value="New"/>
.PDF	DEMO INTERNET CLIENT	Custody Statements Custody (250120231341220640) January 2023	25/01/2023	<input type="button" value="New"/>
.PDF	DEMO INTERNET CLIENT	Custody Statements Custody (250120231341220640) January 2023	05/01/2023	<input type="button" value="New"/>
.PDF	DEMO INTERNET CLIENT 2	Custody Statements Custody (050120230904014780) January 2023	05/01/2023	<input type="button" value="New"/>

You can filter them by date or by document type, as well as by portfolio and by their read status. We advise clients to download the documents they wish to keep.

## Settings

**A** At the top of each page there is the Settings wheel. Clicking this will take you to the Settings page. Here you are able to reset your security questions, change your password, PIN and update other security settings under your Profile.



### Reset security questions

In order to reset your security questions please click the below button. For security reasons once you have saved your security questions you won't be able to view them.

Reset security questions

### Change password

When changing your password, the new password must meet the following criteria:

- Minimum number of characters: 7
- Maximum number of characters: 15
- Contain at least one upper case character
- Contain at least one lower case character
- Contain at least one number

Current password

Enter current password

Please create a password

Enter password

Please confirm your password

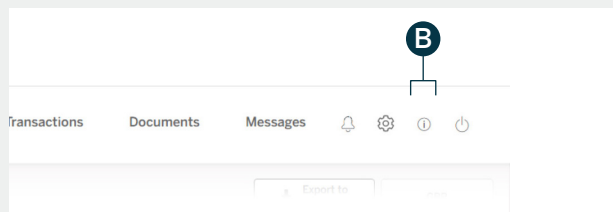
Enter password

Change password



## Accessing more Information

**B** Clicking on the information icon will allow you to navigate to a new page. This page will contain our FAQs, JM Finn Bank Details and information on how to raise a Fraud Alert with us.



The FAQs will show a list of frequently asked questions relating to the Portal, such as if a mobile app is being used and details regarding security features.

The Bank Details will show JM Finn’s Bank Details that can be used in order to transfer money to be used for your portfolios.

Fraud Alert allows you to raise a concern if you feel there is any security threat to your account. To do this, please complete the form which will alert our IT team. They will inform your Investment Manager who will follow up with you to discuss next steps such as locking the account or resetting your details.

---

## FAQs

### **Why has the Portal changed?**

JM Finn continuously strive to deliver a secure environment to its clients, which includes the latest technology and structure. Our new Portal is part of this enhancement process.

### **Is there a Mobile App available?**

Yes, the JM Finn Portal app can be downloaded from your device's app store. The app is reflective of the data on the website and is adaptive to the size of the device

### **Does the Portal support two-factor security?**

Two factor security is available to the mobile app for those devices that support biometric identification via fingerprint or facial recognition.

### **Will my Username & Password change?**

No – you will be able to login to the new Portal with the same Username, Password and PIN as you used on the old Portal.

### **What Internet Browser or Program is the Portal supported on?**

The Portal will function on desk top PCs and Apple Macs using most web browsers, including Microsoft Edge, Google Chrome, Firefox and Safari. The Portal will not work on Internet Explorer due to outdated support by Microsoft, which we consider a risk to the security of your data.



# JM Finn's Client Portal

## Features

Available on your desktop computer, laptop or download our app by searching "JM Finn" on Google Play or the App Store

Arrange meetings with your Investment Manager directly from the portal

View, download and print all your account documentation for the last 3 years from your personal library

View the current value of your portfolio

Drill down to view the asset distribution across your portfolios

View a consolidated holdings report, by family group or by individual portfolio

Send and receive secure messages with your Investment Manager or representative

Two factor access details to help safeguard your privacy

Personal alerts when new documents are posted to your personal library

Access transaction statement and cash statement

Secure log-in from your smart phone or tablet (if available) via biometric identity check

View the portal via the app.

Available at:



Follow us on:



**Registered Office:**  
25 Copthall Avenue  
London, EC2R 7AH

020 7600 1660  
info@jmfinn.com  
[www.jmfinn.com](http://www.jmfinn.com)

JM Finn and JM Finn & Co are trading names of J.M. Finn & Co. Ltd which is registered in England and Wales with number 05772581. J.M. Finn & Co. Ltd is authorised and regulated by the Financial Conduct Authority.

EC-TPPGA4-01-0223