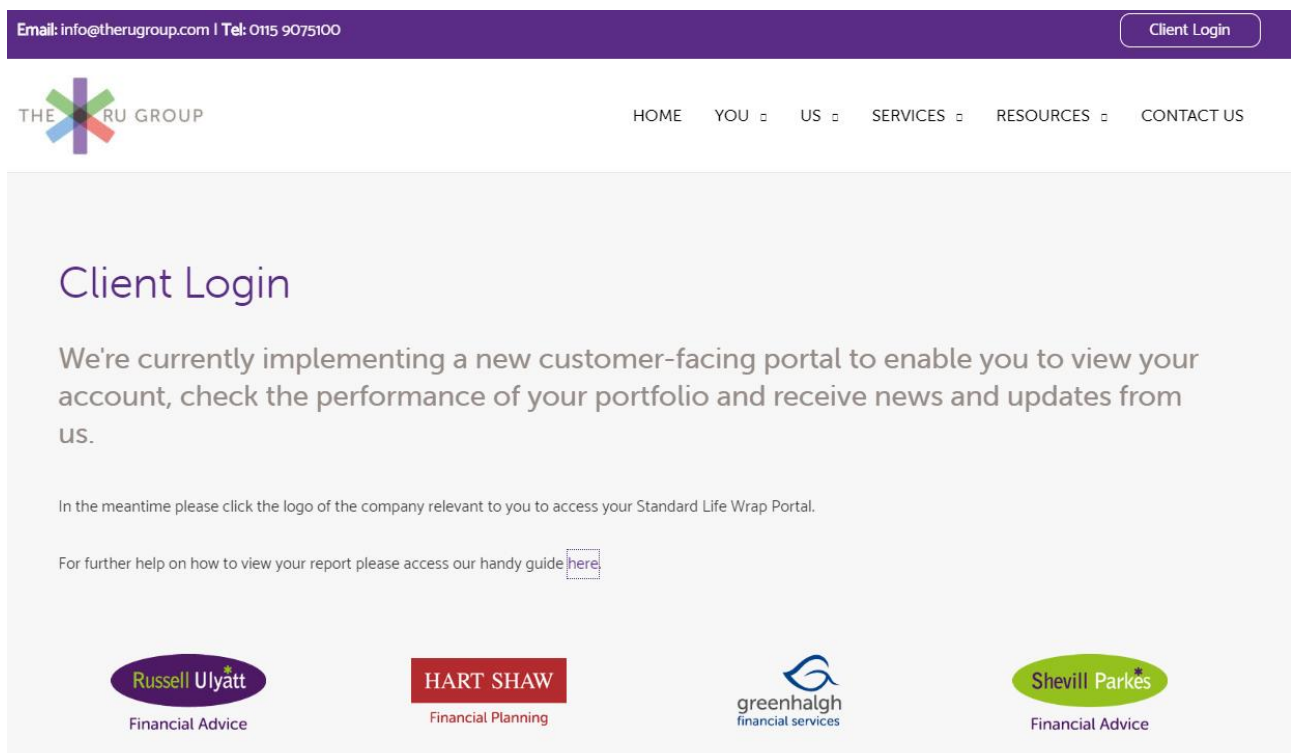


How to view your Portfolio Performance Report

To view your report, you need to be registered to access your wrap account online.
If you haven't already registered, please get in touch with us.

How to log on to your account

Visit www.therugroup.com/login/ and click on the logo for the firm you are a client of.



The screenshot shows the top navigation bar with contact information (Email: info@therugroup.com | Tel: 015 9075100) and a Client Login button. Below the navigation bar is the RU Group logo and a menu with links for HOME, YOU, US, SERVICES, RESOURCES, and CONTACT US. The main content area is titled "Client Login" and contains the following text: "We're currently implementing a new customer-facing portal to enable you to view your account, check the performance of your portfolio and receive news and updates from US." Below this, it says "In the meantime please click the logo of the company relevant to you to access your Standard Life Wrap Portal." and "For further help on how to view your report please access our handy guide [here](#)". At the bottom, there are four logos for client firms: Russell Ulyatt (Financial Advice), HART SHAW (Financial Planning), greenhalgh (financial services), and Shevill Parkes (Financial Advice).

The screenshots below are from our Russell Ulyatt wrap platform. If you are a client of one of our other firms, the screens you see will show the relevant company logo.

Click [Client Login](#)

Enter your [user id](#) then click [submit](#)

Enter characters from your password as prompted then click [submit](#)

The first time you log on, you will be prompted to accept Standard Life's terms of business.

If you have access to view more than one wrap under your login, the screen below will display.

If you have just one wrap account, please go to [How to view your report](#) on the next page.

New Search

Enter Wrap Account Name	<input type="text"/>
Enter Wrap Account Number	<input type="text"/>
Enter Post Code	<input type="text"/>
Select Advisor	All <input type="button" value="v"/>
Account Type	<input type="button" value="v"/>
Account Status	Wrap : Active <input type="button" value="v"/>

Enter your surname in the **Enter Wrap Account Name** field and click **search**.

Your wrap accounts should be listed below the new search box. Click on one of the account names to open it then follow the instructions from **How to retrieve your report**. To view reports for your other wrap accounts, hover your mouse over the **client** tab in the top menu, move it down to **Portfolio** then across to **Summary**. Click on **Back to search results** (on the right hand side of the page) then select your next account and follow the instructions below. You will need to repeat this for each wrap account you have.

How to retrieve your report

Having logged on/selected your wrap, a page similar to the following will display: -

The screenshot shows the 'Portfolio - Summary' page. At the top, there are navigation tabs: 'Clients', 'Admin', and 'Research'. Below that, a sub-menu shows 'Portfolio' selected, with 'Summary', 'Detail', 'SIPP Detail', and 'Cash' as options. The main heading is 'Portfolio - Summary' with a 'Back to search results' link. A control bar includes 'Select view' (set to 'Wrap View'), 'As at' (set to '23/07/2013'), and a 'Go' button. Below this are four tabs: 'Tax Wrapper', 'Asset Class T1', 'Asset Class T2', and 'Matrix'. An 'Include legacy' checkbox is set to 'Yes'. A form displays account details: Account name, Advisor, Account type (Individual), Company (Russell Ulyatt), Email, Home phone, Work phone, and Mobile phone. On the left is a pie chart showing a very small slice in yellow. On the right is a table of investment assets.

Product Wrapper	Location*	%	Value
Investment Assets			
Wrap Cash	Wrap	0.00%	£1.50
Personal Portfolio	Wrap	0.00%	£0.00
ISA Stocks & Shares	Wrap	3.13%	£15,955.96
SIPP	Wrap	96.87%	£494,040.04

Hover your mouse over **Clients**, move it down to **Document Library** then across, up then click **Documents**.

You will see a list of all reports that have been generated for you (there might be quite a lot in here).

Locate the report called **Portfolio Performance Report** showing the most current date in the "date added" column as per the example on the following page.

ID	Type	Document	Date Added	Report Status	Archive Status
68317543	Report	Portfolio Performance Report	07/11/17 11:53:12 AM	Complete	Created <input type="button" value="v"/>
64315831	Report	Portfolio Performance Report	06/11/17 10:52:36 AM	Complete	Created <input type="button" value="v"/>
63271236	Report	Composite Report	22/08/17 03:36:16 PM	Complete	Sent to Client <input type="button" value="v"/>

Click on **Complete** in the "report status" column to open your report (this will contain your Portfolio Performance Report)

Please note, the report is a PDF document. If you don't have Adobe Reader installed on your computer, you will need to click the link below to install the free Adobe Reader download.

<http://www.adobe.com/uk/>

You have the option to print or save your report. When you've finished looking at your report, close the PDF document. You will return to the Documents Library page.

Click on the **logout** button to exit your WRAP account. If you have more than one wrap account to view, please repeat the above instructions for each account.

If you have any difficulty following these instructions, please get in touch with us.

Please note, you will need one of the following browser versions to view your wrap account: -

- Internet Explorer – version 11 or above
- Safari – version 6 or above
- Chrome – version 37 or above
- Firefox – version 26 or above

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 therugroup.com

