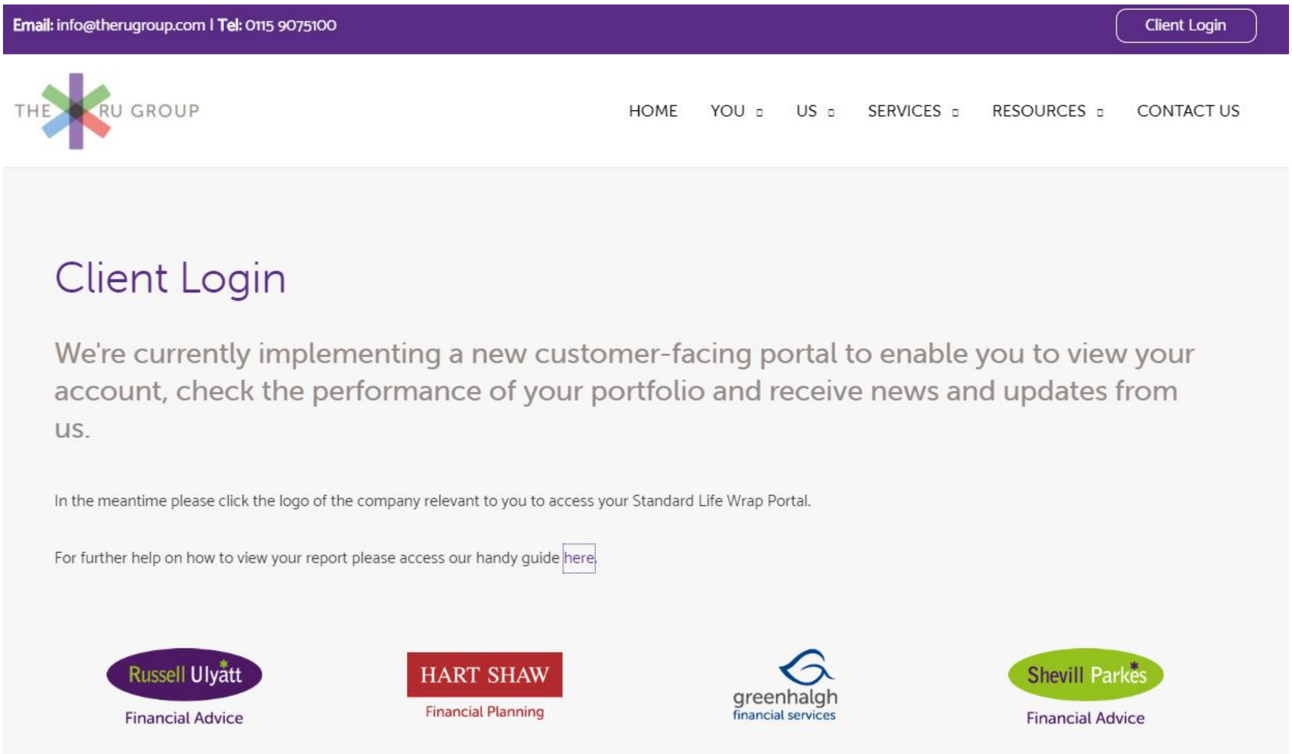
How to view your Portfolio Performance Report

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 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

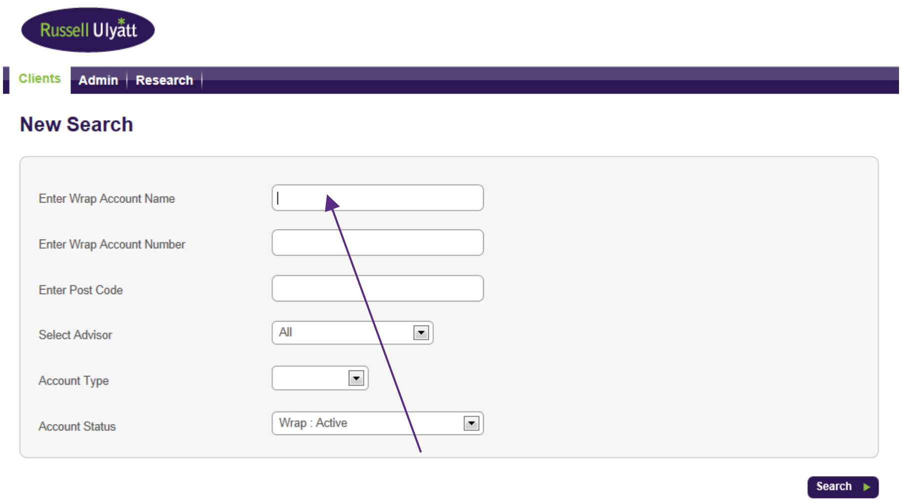
Enter your user id then click submit

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.

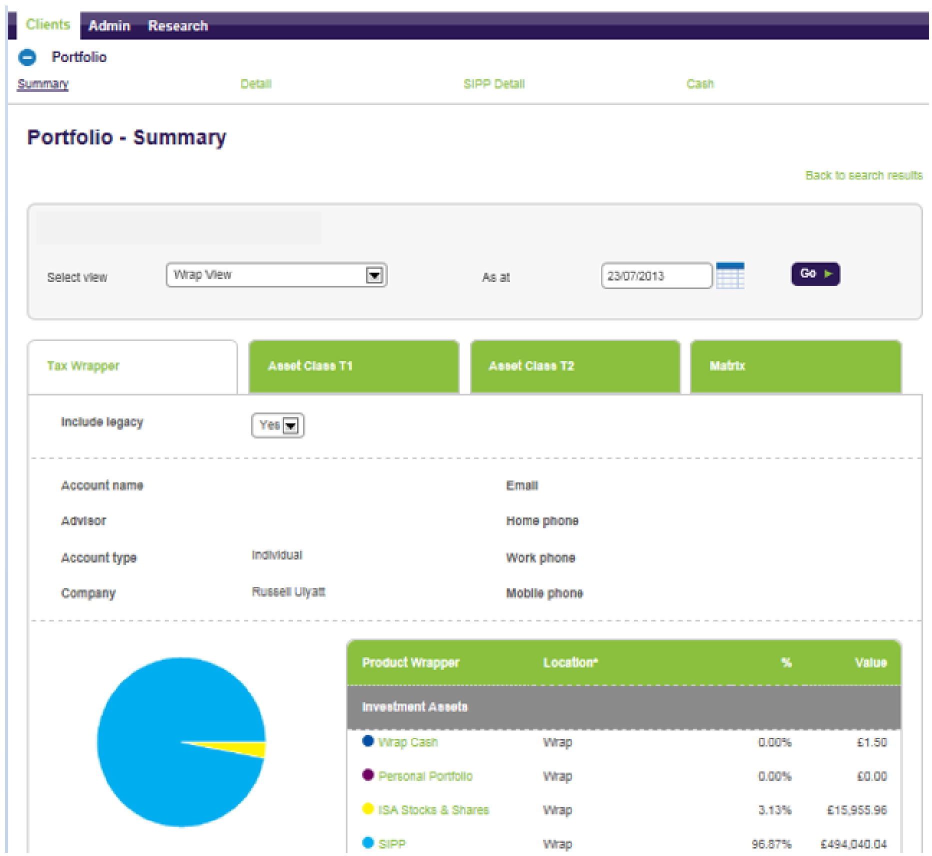


Enter your surname in the Enter Wrap Account Name field and click search.

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: -



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
64315831	Report	Portfolio Performance Report	06/11/17 10:52:36 AM	Complete	Created
63271236	Report	Composite Report	22/08/17 03:36:16 PM	Complete	Sent to Client

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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