



FREQUENTLY ASKED QUESTIONS

We hope the questions and answers below address any queries you may have about the new portal. If, however, you have further queries, please contact the Brompton Operations team by email (bamops@bromptonam.com) or phone (020 7045 0600).

Please note that references to the **Brompton portal** or the **portal** refer to the online portal accessed through your web browser and the app on your smart phone or tablet.

Section 1: GENERAL

Q. Why should I use the Brompton portal?

A. The portal allows you to track the value of your investments and assets and see documents we have shared, with all in one place, safely and securely.

Q. How do I access the online portal via my browser?

A. This link <https://bromptonam-clients.com> takes you to the online portal site. To log in for the first time, you will need your username, temporary password and a six-digit passcode. For security reasons, we will send the one-time passcode to you via the post. Your username and temporary password will be provided in a separate email. This email will come from the email address noreply@bromptonam-clients.com.

When you log on for the first time, you will be asked to change your password, set up a memorable word and give answers to two security questions. The memorable word will be required in addition to the password each time you log in via the portal on a computer. The security questions are only used if you ask to change your password. Brompton will not have access to your new password, memorable word and answers to the security questions. The passcode is just for the first log in.

Q. How do I navigate the online portal?

A. Once logged on, you can navigate via two methods.

- One is the menu on the top left-hand corner of the screen. To see a breakdown of your accounts, select **Investments** and then **Portfolio**. If you then click on **Portfolio** on the main screen, you will see a list of your accounts.
- The second is by selecting the > icon in the bottom right-hand corner of each dashboard pod. From the portfolio overview pod, click on the > icon, then click on **Portfolio** on the main screen to see a list of your accounts.



There is a **Help** icon in the top right-hand corner of the screen.

Q. How do I access the Brompton app?

A. To set up the portal app, please download the app via the App store or Google play. The app is called Brompton Asset Management. Once it is installed, you can access your account using your username and password. You will be prompted to set up additional security related to your phone set-up. Please note that to use the app you need iOS 9.3 or later for iPhones and Android 11 and up for Android phones.

Q. How do I navigate within the app?

A. Once in the app, you can navigate via two methods:

- From the home page click on the heading you require, which includes the > icon. To access an account level breakdown, select **Portfolio** overview, then **Portfolio** on the next page.
- Secondly, click on the menu icon (also known as a hamburger icon) in the bottom right hand corner. Again to access account level information, select **Portfolio** from the menu, and then **Portfolio** on the next page.

Q. How do I run a valuation?

A. In the web-based portal accessed via your computer, navigate to the **Portfolio** page. At the top of the page, select the **printer** icon. This will bring up a valuation statement, which shows the value and book cost of all current holdings and a high-level asset allocation. You can either select to print this or save it as a pdf (by selecting this as an option under the **print** panel).

Please note the valuation is not as detailed as the version included in the old portal. If you would like a more detailed valuation or a valuation at an historic date, please contact the Brompton Operations team via the contact details above.

Q. How can I see performance information?

A. Monthly performance information is uploaded to the portal typically five working days after the relevant month-end.

You can see performance information as an option at account level. Navigate to the **Portfolio** page as described above, select the relevant account and then the **Performance** option. You can select different time periods from the options at the top left-hand corner and this will show on the top graph. Please note that the 3 month, 1 month and 1 week views are not



available at present. The lower graph shows performance since the account opened, with the grey highlighted section being the period shown in the top graph.

Individual holding performance can be viewed by selection on the relevant holding under the Holdings option.

Please note that the graph shown under the **Summary** option is the asset value of the account. This means changes in the value will be affected by cash investments and withdrawals.

Q. If I have a query regarding the information being displayed in Brompton, whom do I contact?

A. In the first instance, please contact the Brompton Operations team via the contact details above.

Q. How do I just see other accounts to which I have access?

A. In the web-based portal, click on drop-down menu button next to **Viewing as** at the top of the page to the left-hand side of the screen. You will have the option to select different account views to which you have access. In the app, selected the person icon in the top right-hand corner, then click **View as** from the drop-down menu.

If you want to change the **Viewing as** options, please contact the Brompton Operations team via the contact details above.

Q. Can I download documents sent to me by Brompton?

A. Yes, you can download any documents within your **Brompton portal**.

Q. How do I upload documents to the Brompton portal?

A. To upload a document, navigate to the **Documents** section. If you using the web-based portal, select the **Upload** button on the right-hand side and upload in the standard way. If you are using the app, select the + symbol and follow the instructions.

Q. What is the maximum size of document I can add to Brompton?

A. The maximum-size document is 5MB.



Q. I cannot remember my log in details, what can I do?

A. If you have forgotten your password, go to the login section of **<https://bromptonam-clients.com>** and input your email address to reset your password. An email will be sent to you containing a link allowing you to validate yourself by responding to security questions, then reset your password. Once you have logged in to the Brompton portal, you can amend your username, password or security questions by clicking on the **Me** icon, then clicking on the relevant tab.



Section 2: SECURITY

Q. What is moneyinfo?

A. moneyinfo Limited has developed and maintains the Brompton portal as Brompton's technology partner. More information can be found at www.moneyinfo.com.

Q. How secure is it?

A. Cyber security is of the utmost importance to Brompton and its technology partners. All data within the Brompton portal is fully encrypted and accessible via multi-factor authentication, together with other security measures to ensure your data is protected at all times.

All information is securely sent and received encrypted. This means information cannot be read by anyone intercepting communications between your computer, your smart phone or your tablet and the portal. moneyinfo protects its infrastructure using advanced technologies and a Security Operations Centre (SOC), which monitors what happens in its environments at all times. This means if something looks suspicious, the SOC will inform Multrees immediately. Also, your data is stored in an environment located in an ISO27001-certified facility protected by physical security, electronic security and internal security policies to ensure your details remain totally secure.

The infrastructure is designed to allow for high availability. If there is a blip and something goes wrong, back-up systems automatically pick this up, ensuring you can still access your information seamlessly.

Q. How private is my data?

A. Extensive safeguards are in place to protect your identity, privacy and financial data at all times on the portal. Third parties will only have access to your data if you have instructed us to give them access.

Q. Is my data protected under the Data Protection Act?

A. Brompton Asset Management and Multrees Investor Services operate under the General Data Protection Regulation and the Data Protection Act (DPA 2018) so any data, documents or messages are kept safe and secure, with rigid data protection principles enforced. Brompton does not share data or information with third parties unless you have given explicit consent.



Q. What happens to my data if I no longer use Brompton?

A. If you cease to be a client of Brompton Asset Management, your portal access will be revoked. You will have an opportunity to download your data in line with the regulatory requirements. All data will be deleted from the servers after 30 days from the deletion of your account.