FREQUENTLY ASKED QUESTIONS

We hope that the question and answers below address any questions that you may have on the new portal. However, if you have any further questions, please contact the Brompton Operations department either by email (bamops@bromptonam.com) or via the phone (020 70450600).

Please note that references to the **Brompton portal** or the **portal** refer to both the online portal accessed through your web browser and also the app.

Section 1: GENERAL

Q. Why should I use the Brompton portal?
A. The **Brompton portal** allows you to track the value of investments and assets and also see documents that 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 will take 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 or the first time, you will be asked to change your password and also to set up a memorable word and two security questions. The memorable word will be required in addition to the password each time you log in via the portal on the desktop. The security questions are only used if you request to have your password changed. Brompton will not have access to your new password, memorable word and security questions. The PIN is just for the first log in.

Once logged on, you can navigate either via the menu on the top left hand corner of the screen or by selecting the > icon in the bottom right hand corner of each dashboard pod. There is a help icon in the top right hand corner of the screen.

Q. How do I access the Brompton app?
To set up the portal app, you need to 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 the app does require that you have iOS 9.3 or later for iPhones and Android 11 and up for Android phones.

Once in the app, you can navigate either from the home page by clicking on items followed by the > icon or via the menu icon (also known as the hamburger icon) in the bottom right hand corner.

Q. How do I run a valuation?

A. In the web based portal, 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 that the valuation is not as detailed as the version that you can access in the old portal. If you would like a more detailed valuation or a valuation at a historic date, please contact the Brompton Operations department via the contact details above.

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

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

Q. Can I just see my accounts rather than all accounts that I have access to?

A. In the web-based portal, you should see "Viewing as" with a drop down at the top of the page to the left hand side of the screen. If you select the drop down, you will have the option to select just your accounts or all accounts that you have access to. In the app, selected the person icon in the top corner and then "view as" from the drop down. This should enable you to select to view either just your accounts or all accounts that you have access to.

Q. Can I download the documents that are sent to me in 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 are in the web-based portal, select the upload button or the + symbol in the app, and follow the instructions.

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

A. The maximum size document is 5MB.

Q. Who is moneyinfo?

A. moneyinfo Limited has developed and maintains the **Brompton portal** and is our chosen technology partner. More information can be found here www.moneyinfo.com

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 e-mail 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 and then to reset your password. Once you have logged in to the **Brompton portal,** you will

be able to amend your username, password or security questions by clicking on me > Settings.

Section 2: SECURITY

Q. How secure is it?
A. As you would expect, cyber security is of the utmost importance to us and our carefully selected 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, which means that information cannot be read by anyone listening between your computer and the **Brompton** portal. Our technology partner, moneyinfo, protects its infrastructure in several ways using advanced technologies and also using a Security Operations Centre (SOC), which monitors what happens in their environments 24/7/365. This means if something looks suspicious, their SOC will inform Multrees immediately. Also, your data is stored in an environment located in an ISO27001 certified facility, that is protected by the very best in physical security, electronic security and internal security policies to ensure that your details remain totally secure.

The infrastructure is designed in such a way to allow for high availability; if there is a blip and something goes wrong in the facilities, a spare piece of the environment automatically picks it up, which ensures that you can still access your information seamlessly.

Q. How private is my data?
A. There are extensive safeguards 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 strictly adheres to the General Data Protection Regulation and the Data Protection Act (DPA 2018), so you can be assured that any data, documents or messages are kept safe and secure with rigid data protection principles in mind. We do not share any data or information with third parties, unless given explicit consent by you.

Q. What happens to my data if I no longer use Brompton?
A. If you decide to no longer be a client of Brompton Asset Management, then your **Brompton** access will be revoked. You will have an opportunity to download your data in line with the regulatory requirements. All data will be completely deleted from the servers after 30 days from the deletion of your account.