My William Blair Quick Start Guide

How do I login?
- Go to www.mywilliamblair.com
- Enter your Login ID (your e-mail address) and Password.

Where do I find reports, such as Holdings and Realized Gains/Losses?
- Reports can be accessed by hovering over Reports on the navigation bar at the top of the page and selecting the desired report
- For example, Realized Gains/Losses can be found under Reports > Transaction Reports > Realized Gains/Losses

How do I view information for just one account?
- A specific account can be selected using Search Accounts box, under the Find Data for list
- Enter a portion of the account name in the Search Accounts box
- Select the account from the Find Data for list
- To see information for all your accounts, select All Accounts from the Find Data for list

How can I change my password?
- In the upper right hand corner of the web page, click My Profile
- Follow the information on the screen to set up a new password

How can I access statements and other documents?
- To access archived statements for accounts held at William Blair, select Statements, Confirms, and 1099’s from the Documents menu
- To access your Document Vault, select Vault from the Documents menu.

Additional help
The My William Blair Investment Portal User Guide and FAQs booklet contains additional details about using the system.

However, do not hesitate to contact your Portfolio Associate or Financial Advisor with any questions. They are happy to assist you!