

William Blair

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. Your Login ID and temporary password were e-mailed to you.

Where do I find reports, such as Appraisals and Realized Gain/Loss?

- Reports can be accessed from the **Reports** menu at the top of the screen
- For example, the Position Appraisal can be accessed by selecting **Holdings** from the **Reports** menu
- The same approach can be followed to access other reports, such Asset Allocation, Income and Expenses, Realized Gain /Losses, and Transactions

How do I view information for just one account?

- A specific account can be selected using **Search Accounts** box, next to 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 and click on the **Change** button
- To see information for all your accounts, select **All Accounts** from the **Find Data for** list and click on the **Change** button

How can I change my password?

- In the upper right hand corner of the web page, hover over the **Welcome** header, and 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. For existing clients, the vault will already contain several key reports from end of year 2014.

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!