

New Look for My William Blair

William Blair

The screenshot displays the My William Blair client portal interface. At the top, there is a navigation bar with the William Blair logo, 'My William Blair', and menu items for ACCOUNTS, REPORTS, and DOCUMENTS. A search bar is located below the navigation bar. The main content area is divided into several sections: 1. HOLDINGS: A table listing various stocks and their values as of 07/11/2016. 2. DOCUMENTS: A list of recent documents, including 'What's New in My William Blair.pdf'. 3. ANNOUNCEMENTS: A section for updates, featuring a 'Welcome to My William Blair' message. 4. ASSET ALLOCATION (GLOBAL ASSET CLASS): A pie chart and table showing the distribution of assets across different classes like Global Equity, Cash & Cash Equivalents, Global Fixed Income, Alternatives, and Real Estate.

Description	Quantity	Value	Accounts
STANLEY BLACK & DECKER INC (SWK)	4,400	537,152	3
PEPSICO INC (PEP)	4,000	433,760	5
COGENT COMMUNICATIONS HOLDINGS INC (CCOI)	8,500	366,946	7
WATERS CORP (WAT)	2,188	339,359	2
ACCENTURE PLC IRELAND SHS CL A (ACN)	2,919	331,482	3
AFFILIATED MANAGERS GROUP SR NT 42 (008252876)	12,000	323,280	1
AON PLC SHS CL A (AON)	2,690	298,012	3
INTUITIVE SURGICAL INC COM (ISRG)	425	292,451	6
ISHARES U S PREFERRED STOCK ETF (PFF)	7,284	292,088	1
CHEVRON CORPORATION (CVX)	2,816	289,513	6

Global Asset Class	Current Value	Current Percent
Cash & Cash Equivalents	(1,170,909.75)	(7.32%)
Global Fixed Income	2,819,128.03	17.63%
Global Equity	13,969,120.20	87.37%
Alternatives	218,470.44	1.37%
Real Estate	152,280.00	0.95%
TOTAL	15,988,089	100.00%

1 Menu Bar and Navigation

The Menu bar is more streamlined, providing easier navigation and additional screen space.

2 Announcements

Announcements posted to My William Blair and to Client Portals will now appear under the exclamation point symbol in the upper right hand corner of the screen.

3 Interactive Charts

We think you will be excited about the interactivity we have added to dynamic reports, making it easier to identify and focus on the data that you want to see. For example, in the Asset Allocation chart, hovering over Global Fixed Income provides additional detail.

Important: Discontinued Support for Internet Explorer 10

Using the latest version of your preferred browser will provide the best user experience and functionality available for My William Blair. If using Internet Explorer, please upgrade to Internet Explorer 11 or greater as Explorer 10 is no longer supported.