



ARBUTHNOT LATHAM

Bankers since 1833

Arbuthnot Latham Digital Wealth

Frequently asked questions

1. How do I access Digital Wealth?

Please visit <https://aldw.arbuthnotlatham.co.uk/>

2. How do I log in?

Your username and password remain the same. Should you need to log in for the first time, you can register here: <https://aldw.arbuthnotlatham.co.uk/>.

3. Can I change my password or secret phrase?

Once you have logged in successfully, you can click on your profile icon screen and select "Settings". From here you can amend your password or secret phrase.

4. I have forgotten my password or secret phrase. What do I do?

Please contact your investment manager who will arrange for a new password and/or secret phrase to be issued to you. Please allow 24 hours.

5. What has changed?

Client view:

- You can access a customisable dashboard of all your portfolios on a single landing page; previously you could only view individual portfolios at a time. This allows you to understand instantly how much of your assets are held in each of your portfolios.

Holdings:

- You can choose how to view your holdings; by list or a range of graphs for easy visualisation.

Documents:

- In the documents tab you can access and download documents, including contract notes, quarterly valuations, costs and charges reports and tax packs.
- To make it easier to find the document you are looking for, we have created the following collapsible folders:
 - Costs and charges
 - Contract notes

- Tax reports
- Valuations

Security trades

- You can find recent transactions through your portfolio

Cash transactions

- You can find cash dividends and other cash transactions quickly in one place

Valuations

- You can access your portfolio valuations
- You can change the graph type to suit your preference

6. Why is the look and feel different?

We have upgraded the investor portal to give you a better online experience. Our new Digital Wealth design has been brought up to date with our new brand and gives you the opportunity to view your investment charts in a format of your choice.

7. What if I go to the old investor portal?

You will be taken to a landing page which will redirect you to the new Digital Wealth site. We suggest you add the new web address to your favourites.