SecondHalf Coach Wealth Management

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VISION2020 One View Account Access

You can take the following steps to register for online access to view your accounts.

It is recommended that Internet Explorer (or Safari for Apple Users) be used for ease in registering as users have had trouble while using Google Chrome or Firefox.

1. Within your internet browser, access: https://oneview.v2020-sai.com/
2. We recommend that you bookmark this website within your favorites as this is the link you will visit to log in and view your accounts.
3. Click on the "Register Now" link located within the login box.
4. Enter the account holder's social security number (no spaces or dashes)
5. Enter the following temporary password: **AFADZV**
6. You may be prompted to decipher a code to move forward with the registration. Type the word as you see it on the screen and select next.
7. Accept the User Agreement.
8. Create a username and password and fill in all fields requesting personal information and click next to continue.
9. Click "Okay" when the confirmation appears.

Once you have completed your registration, SecondHalf Coach Wealth Management will automatically be notified of your request for access. Please allow 1-2 business days for us to process your request. You will receive an email notifying you upon completion of the registration process. Once you have received this notification email, access "One View Account Access" link and enter your username and click continue. Enter your password and you will be able to login and access your account information.

Once you log in, you can access the portfolios we have set up for you. You can also change the "Report/Package" to view your accounts in multiple views. We recommend the following Report types which you should be familiar with from your client review meetings:

- Portfolio Snapshot (pie): details performance of your portfolio over a selected time period
- Holdings by Investor: details all accounts and balances
- Transactions by Investor: details transactions within the account over a selected time period

When using any of these reports, you can change the time period to reflect the period that you would like to review.

If you have any questions or you need further assistance, you can email us at info@shcwealthmanagement.com or contact our office at 724-537-2799.