

*Welcome to Symmetry Partners and thank you for your account. Account statements are mailed quarterly, however you may view your account online by following the directions below.*

### Client Procedures for TCAccess II:

1. To access your accounts go to the web address:

www.symmetrypartners.com

2. Click the "*Account Login*" link located in the upper right-hand portion of the grey navigation bar.
3. The username is your six-digit account number.
4. Initially, your password is your Social Security Number without hyphens (XXXXXXXXXX) If you are already established with Symmetry, please use your existing login and password.
5. After you enter your username and password, click Submit
6. After you have logged in you will be asked to change your password and then confirm it.

The guidelines for creating your new password are as follows:

- a. Must be 6-14 characters
  - b. Cannot contain any spaces
  - c. Must contain at least one letter
  - d. Must contain at least one number
  - e. Must be different than the original password
7. When this is complete you will automatically be taken to the ***Dashboard*** page. This screen will display:
    - a. Your name and your account number
    - b. Last updated time
    - c. Total Value
    - d. Value of assets and cash
    - e. Cost Basis
    - f. Unrealized Gains/Losses
    - g. Pending Cash
  8. On the left of the screen lists additional options to view. For example:

- a. Positions
- b. Pending Activity
- c. Transaction History (dating back to inception)
- d. Assets in Transfer
- e. Contributions/Distributions
- f. Tax Forms

9. When finished viewing your account, please logout of the site.

**PLEASE NOTE: Your username/password will be disabled automatically after three unsuccessful login attempts, and must be reset.**

If your username/password has been disabled, please e-mail the *Symmetry Help Desk* [support@symmetrypartners.com](mailto:support@symmetrypartners.com) In your e-mail, please include your username and date of birth to verify your information.