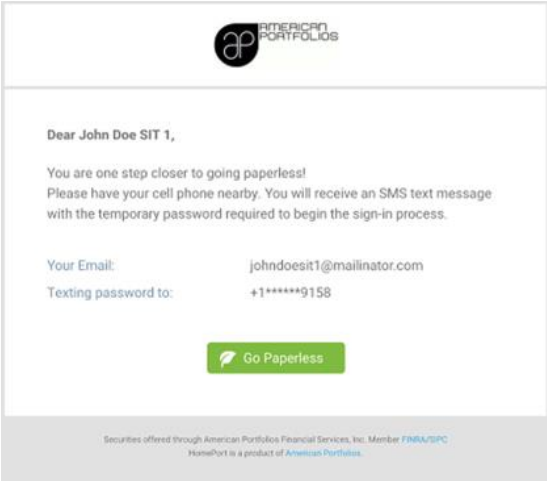
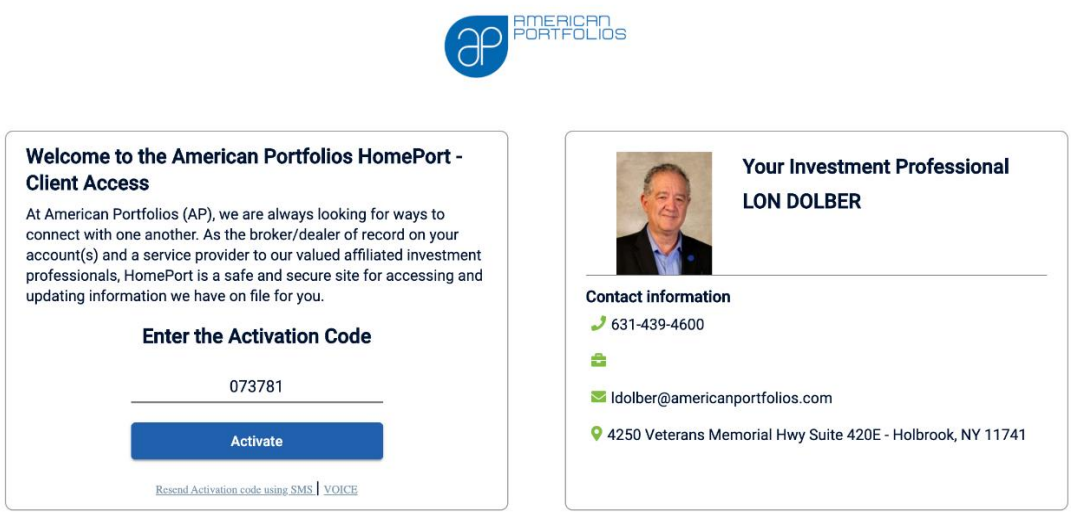
HomePort – Client Access Client Authentication

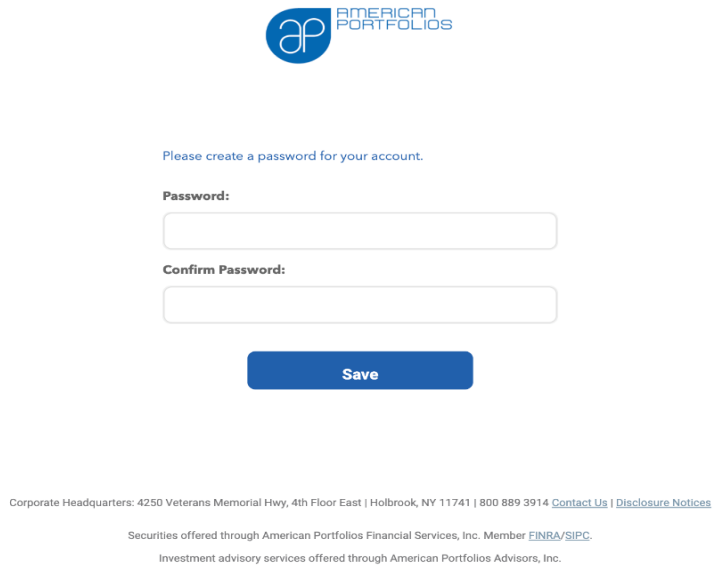
When you are first invited into HomePort – Client Access, you will need to authenticate/confirm your identity, create a password and log in. To begin this process, go to the e-mail that was sent from your investment professional. Click the link within the e-mail to begin the process, verify your e-mail and last four digits of your cell phone, and click “Go Paperless."

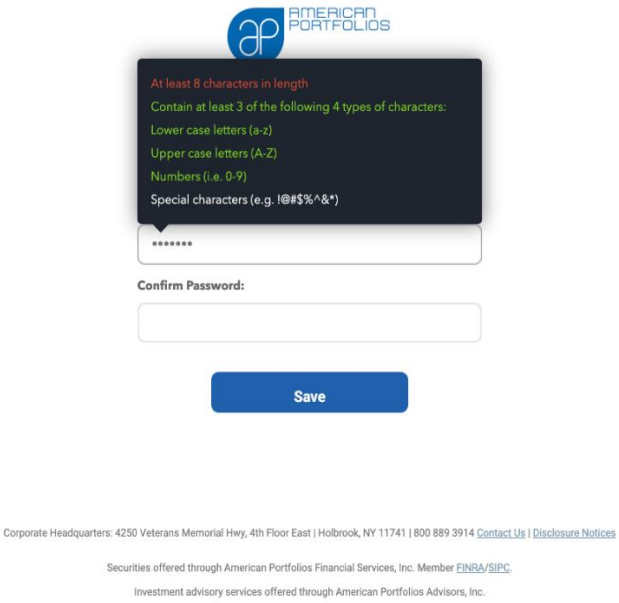


An SMS text message will be sent to your cell phone including an activation code. At the same time, you will be brought to a Web page showing the contact information for your investment professional; on this screen, enter the activation code sent via text and click “Activate.”

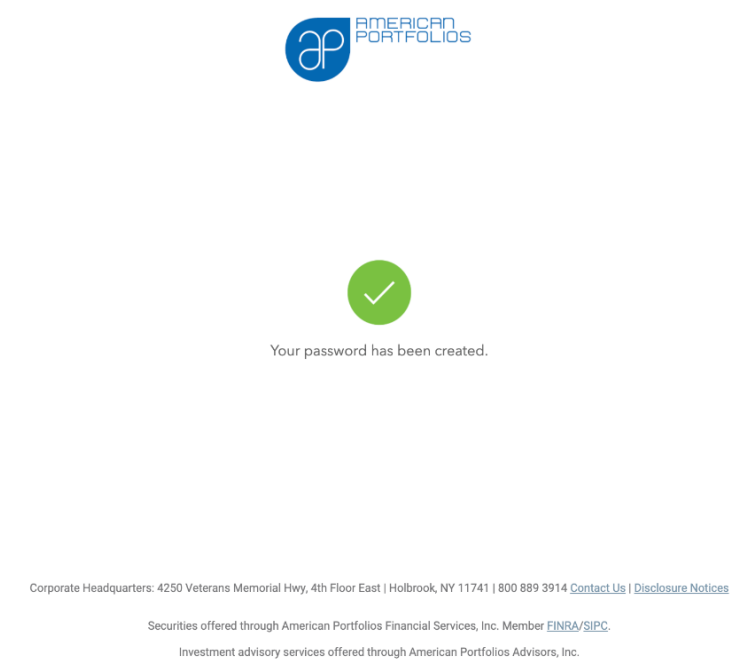


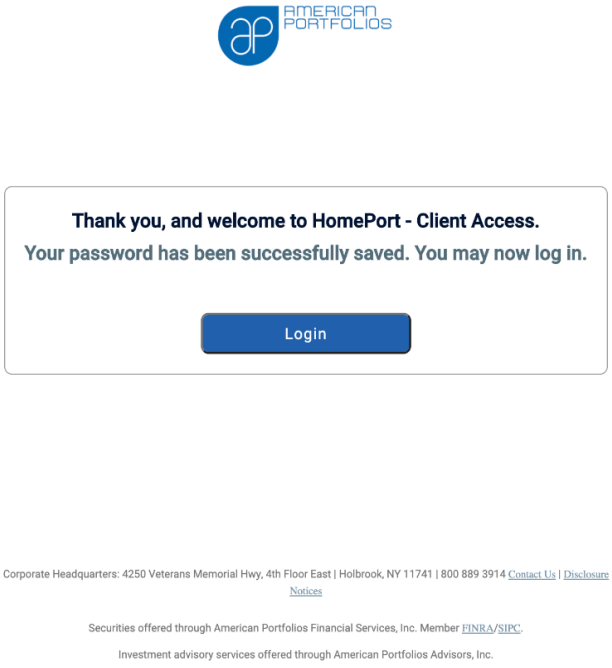
Upon providing the correct activation code, you will be prompted to create a password; be sure to enter the password twice and click “Save.” As you type your desired password, the password rules will appear to show which rules have been satisfied and which still need to be included.





Once you have successfully created your password, a screen will appear confirming “Your password has been created.” This screen will only remain visible for a second or two, before a confirmation page with Login button appears.

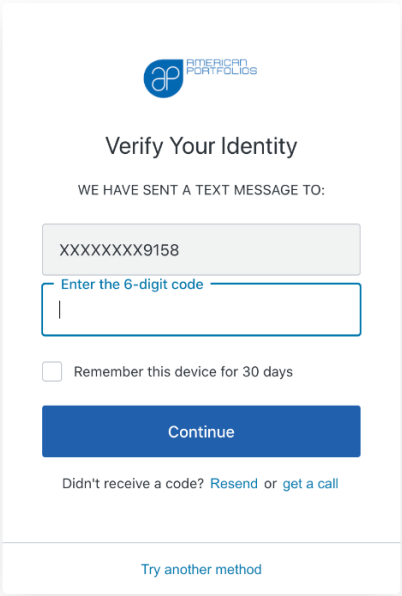




Of note, if you do not act upon an invitation e-mail within three days, that e-mail will expire and a reminder e-mail will be issued. Three reminder e-mails will be issued if the invitations continue to go unresolved. After three unresolved e-mail invites your investment professional will need to issue a new invitation.

HomePort: Login Experience
To login you may visit www.ppsadvisors.com/p/client-login and select HomePort or visit www.americanportfolios.com and click “Login” in the upper-right corner.

After entering your login credentials a screen will appear notifying you that a text message has been sent to the on-file cell phone number, asking that you verify your identity. Enter the activation code received via text and click “Continue.”



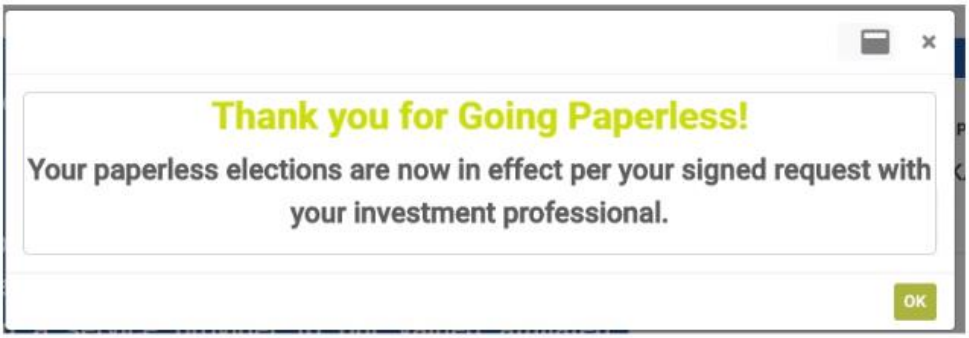
Of note:

- If you do not wish to be prompted to do this at every login occurrence on a specific device and browser, be sure to check the box labeled “Remember this device for 30 days.”
- If you do not receive the authentication text message, click “Resend” to have another code sent to you.
- If you would prefer to receive a phone call stating the access code, rather than a text message, click “get a call.”

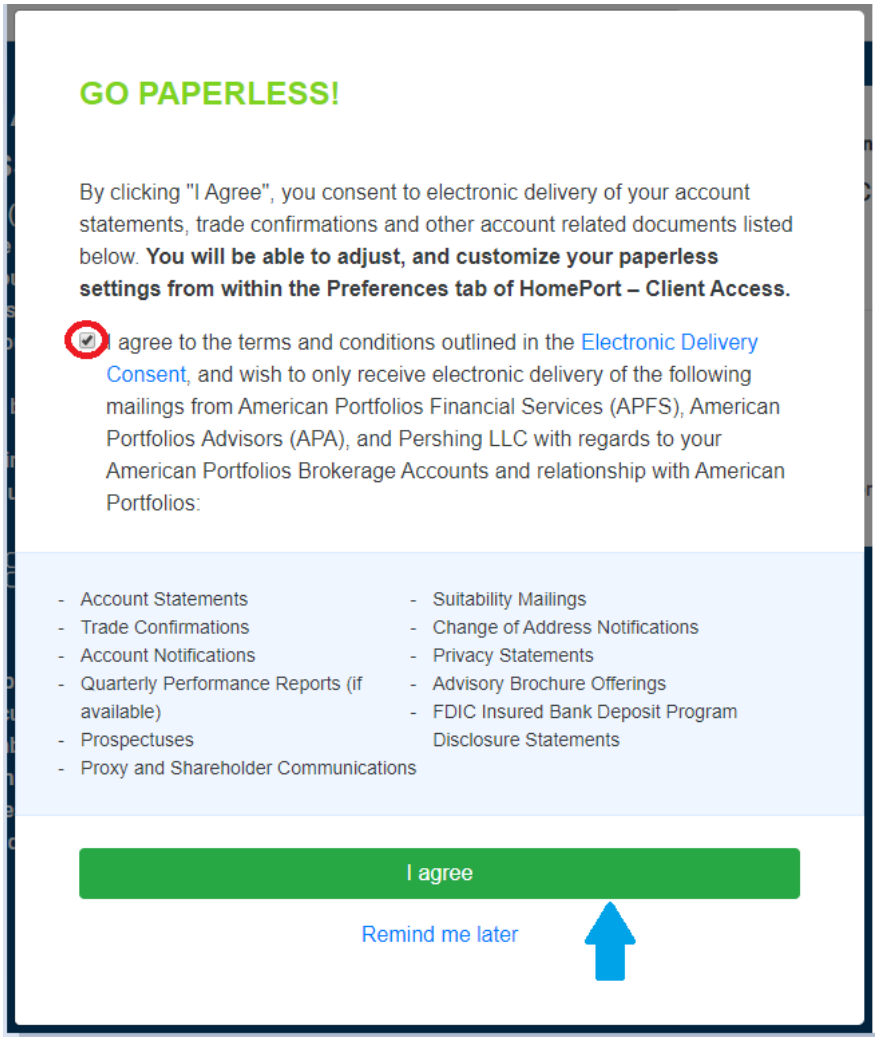
HomePort – Client Access Experience

When you first log into HomePort – Client Access, you may be presented with a pop-up that allows you to elect to go paperless on all of your Pershing accounts and your AP mailings.

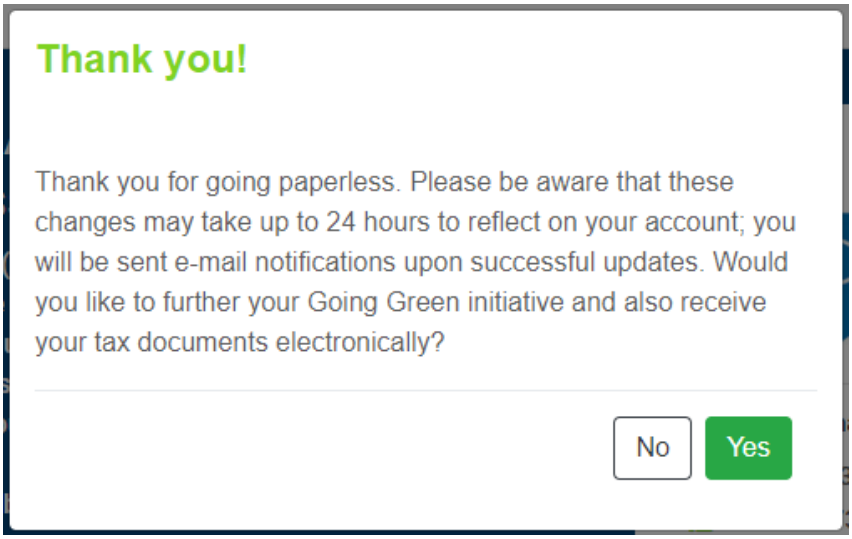
If this is your first login and you had previously signed a document in order to go paperless, you will receive a thank you pop-up.



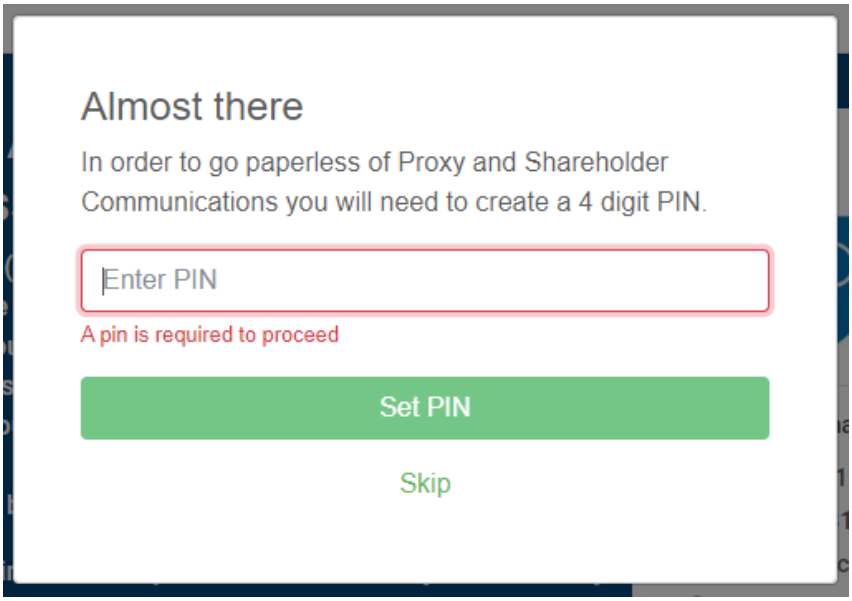
- To opt out of receiving physical mailings and go paperless, simply click the checkbox illustrated below, and then click “I agree”; you will now be made paperless on all AP mailings, and all mailings for any Pershing account you are authorized to make changes to.



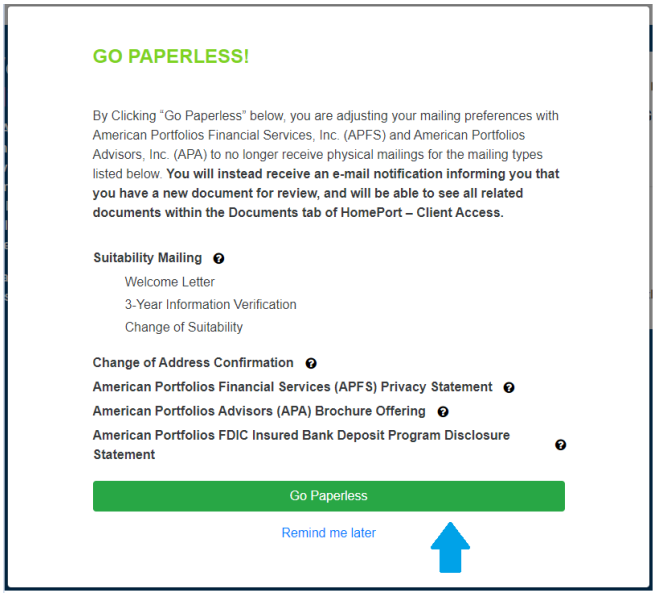
- You will then receive a thank you pop-up informing you that the changes may take up to 24 hours to be reflected in NetX Investor. Click “Yes” if you would like to also receive tax documents electronically; otherwise, click “No” to complete the process.



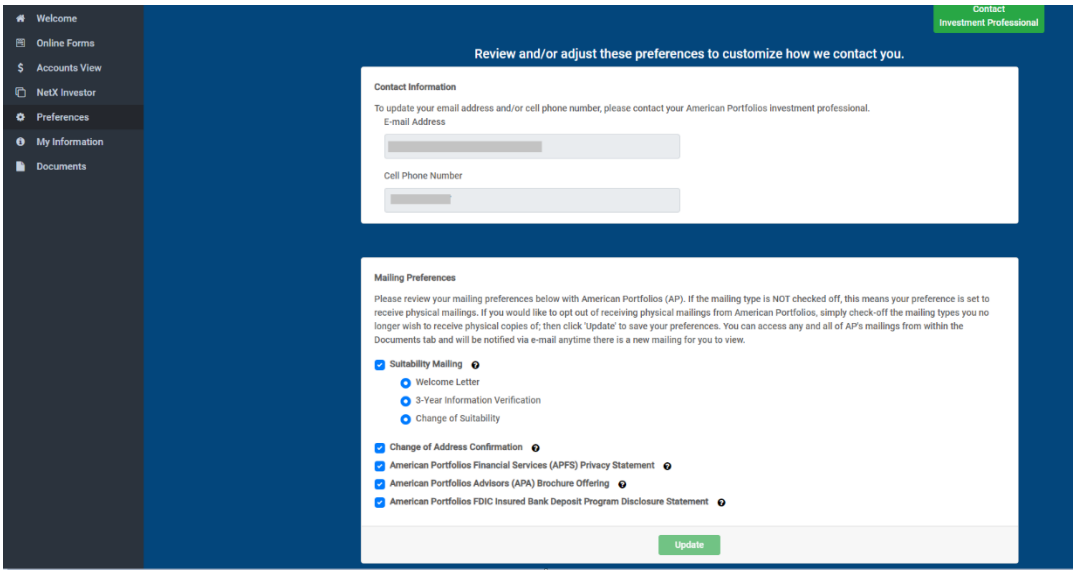
- If you have not already established a Broadridge PIN for electronically receiving Proxy Shareholder Communications, a dialog box will appear asking you to create a 4-digit PIN. Broadridge is the third-party vendor responsible for issuing Proxy Shareholder Communications. Should you decide to skip this step, we will continue making you paperless on each of the other mailing types.



- If you do not have any Pershing accounts, a different pop-up will appear, speaking only to American Portfolios mailings.
- This pop-up will be dynamic and only display the mailing types that you have not yet elected to go paperless on.
- Each mailing has a tool tip to the right. By hovering your mouse over the tool tip, an explanation of the mailing type will appear.
- To go paperless, simply click the “Go Paperless” button.

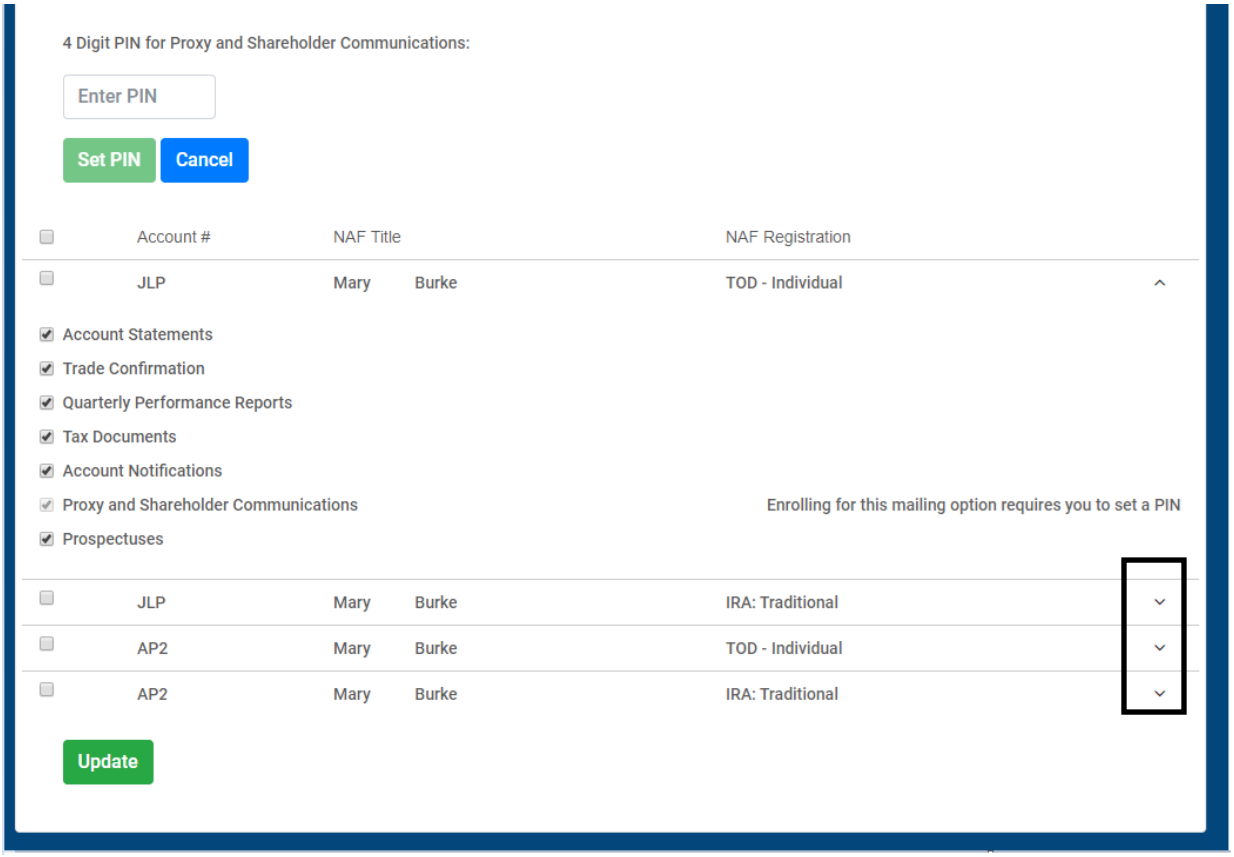


- You will then automatically be brought to the Welcome section, unless you have an outstanding Client Online Form or E-Sign package awaiting your signature, in which case you will be brought to the Online Forms Tab instead.
- Of note, you may change your preferences at any time via the Preferences section of HomePort – Client Access. There, you will see your current e-mail address and cell phone number, along with your current mailing preferences.
    - Anything checked off is paperless. Anything not checked is set to receive physical mailings.
    - To change a preference, simply check or uncheck the mailing type and click the “Update” button.



If HomePort knows your NetX Investor User ID, you can scroll down to see all of your Pershing accounts that you are authorized to make updates to the mailing preferences.

- To select all mailing types for all accounts, simply click the checkbox atop the others, and click the “Update” button. If you are checking the box, then you are setting each mailing type to be delivered electronically. If you uncheck the box, you are setting your preference to have each mailing type physically mailed to your mailing address.
- To individually set a preference on an account or for a specific mailing type, click the downward arrow to the right of the desired account.



Additionally, if you are in NetX Investor, you will see a “Go Paperless” button atop the page. By clicking “Go Paperless,” you will be walked through Pershing’s process of going green and opting out of receiving physical mailings.

Of note, you need only perform one of the above processes in order to go green. Once you have set a preference for a mailing type to be delivered electronically, you can expect to receive an e-mail notification informing you of your new document for review. If the mailing was sent from American Portfolios, you can access the document from within the Documents section of HomePort – Client Access. If the mailing was sent from Pershing, the document will be accessible from within the My Documents link under Quick Links on the right-hand side within NetX Investor.