



# CIR Statements Investor Guide

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## How to Log In

Our current login process is migrating to Microsoft Azure, a platform that requires two-step, also known as two-factor, verification. This standardized login process uses your email address as a unified login ID, fortifies your data integrity, and enhances your user experience across all our applications and the Wove platform.

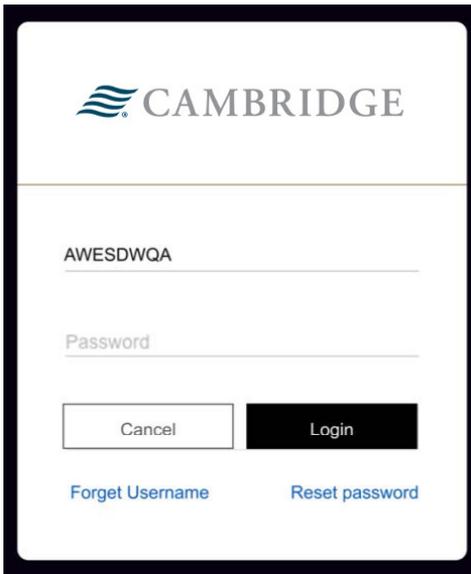
Once you create a user profile and provide login credentials, all subsequent logins will use the two-step process across applications and firms. This guide will help you establish the user profile and credentials for the unified login process.

**Step 1:** When you open the application, you will see the following screen. Enter your old login ID.



The screenshot shows the Cambridge login interface. At the top is the Cambridge logo. Below it is a text input field labeled "Login ID". Underneath the field is a checkbox labeled "Remember my login ID". A black button with the text "Continue" is positioned below the checkbox. At the bottom of the screen, there is a link that says "Need help logging in?".

**Step 2:** Enter your password and click **Login**.



The screenshot shows the Cambridge login interface for the password step. At the top is the Cambridge logo. Below it is a text input field containing the text "AWESDWQA". Underneath this field is a text input field labeled "Password". Below the password field are two buttons: a white button with the text "Cancel" and a black button with the text "Login". At the bottom of the screen, there are two links: "Forgot Username" and "Reset password".

NOTE: If you cannot remember your login ID, just enter what you think it might be, and the system will direct you to the screen in Step 2, where you can click **Forgot Username**. If you cannot remember your password, click **Reset Password**.

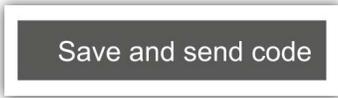
Each hyperlink will bring you to the appropriate screen, where you can fill out the necessary information and then click **Send Me Username** or **Reset Password**, depending on your need. Upon completion, you will be redirected to the log-in page shown in Step 1.

**Step 3:** Once you have logged in, the system will redirect you to a screen to set up your new username and password. **Your email will be your new username.**

Choose a password of 8-16 characters. Make sure that it includes at least three of the following:

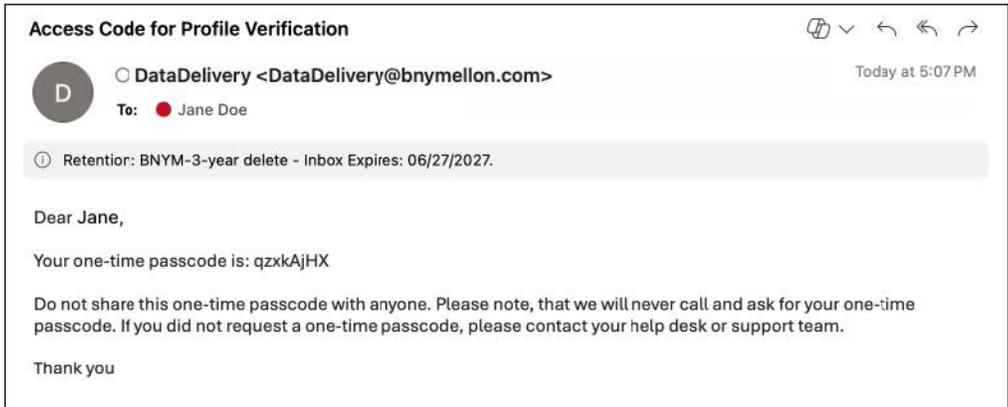
- Uppercase letter
- Lowercase letter
- Number (0 -9)
- Special character, such as @, #, \$, etc.

**Step 4:** Click **Save and send code** at the bottom left of the page.

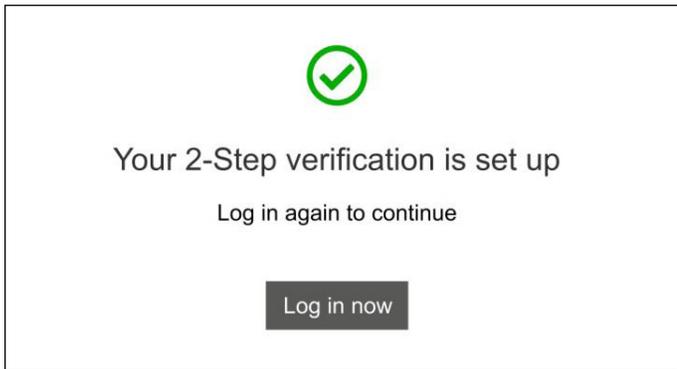


**Step 5:** The system will notify you that a verification email has been sent to the email account you listed in the previous page.

**Step 6:** Check your email for a one-time passcode. Then enter the code in the box outlined in red in the figure above. Click **Continue**.



**Step 7:** A screen noting that your two-step verification has been set up will prompt you to log in again. Click **Log in now**.

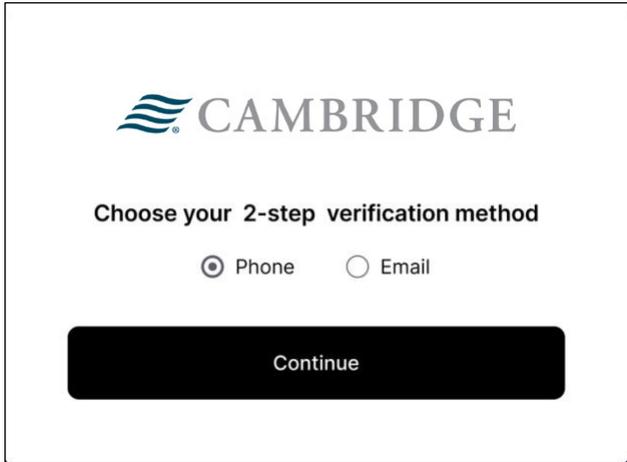


**Step 8:** Enter your password and your login ID, which is your email, and then click **Log in**.



**NOTE:** Should there be an error, the system will show a message asking you to try setting up two-step verification again. Just click **Try again**, and you will be redirected to the login page, where you can begin setting up your two-set authentication.

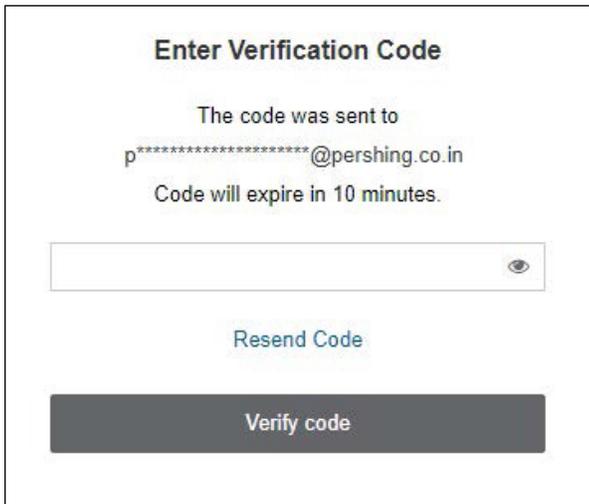
**Step 9:** The system will ask whether to send the verification code to your email or via a text. Choose an option and then click **Continue**.



The screenshot shows the Cambridge logo at the top. Below it, the text reads "Choose your 2-step verification method". There are two radio button options: "Phone" (which is selected) and "Email". At the bottom, there is a large black button labeled "Continue".

**Step 10:** Check your email or text messages for the verification code.

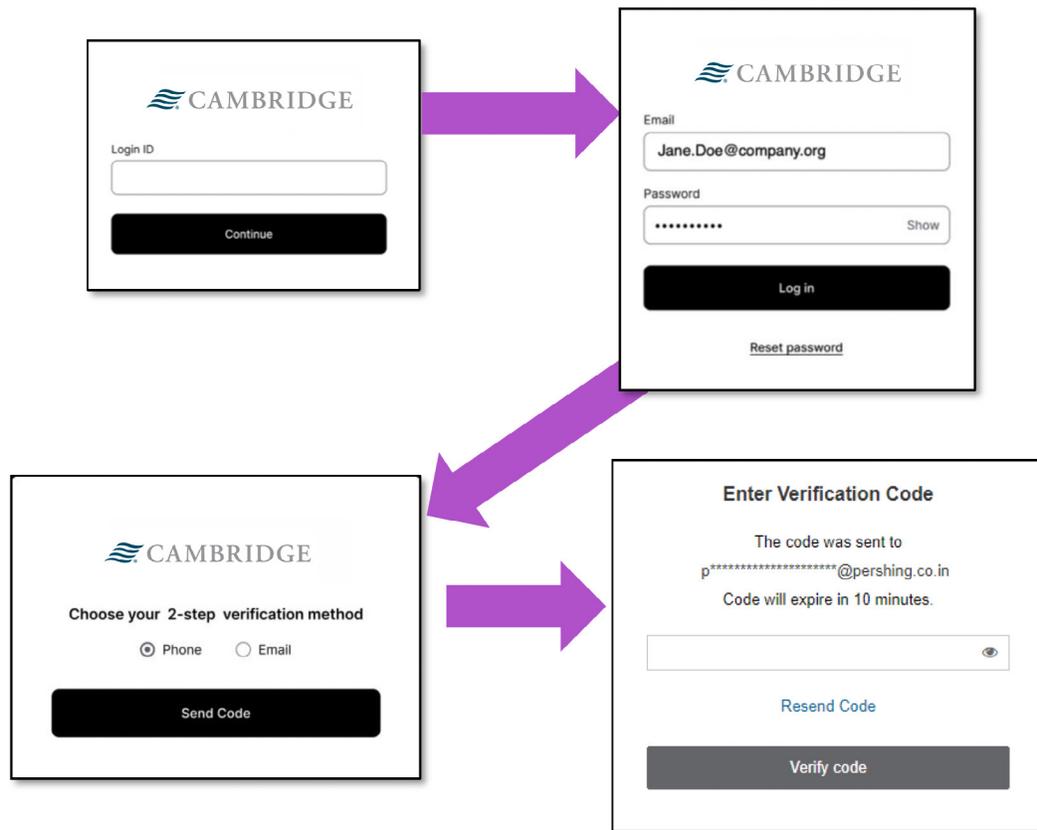
**Step 11:** Enter the verification code in the spaces provided and click **Verify Code**. If you cannot find the code, click **Resend code** and retry.



The screenshot shows the "Enter Verification Code" screen. It displays the text "The code was sent to" followed by a redacted email address "p\*\*\*\*\*@pershing.co.in". Below this, it says "Code will expire in 10 minutes." There is a text input field with a small eye icon on the right side. Below the input field is a blue link labeled "Resend Code". At the bottom, there is a large grey button labeled "Verify code".

**Step 12:** You will land on your home page from which you can navigate through the Wove Reporting application.

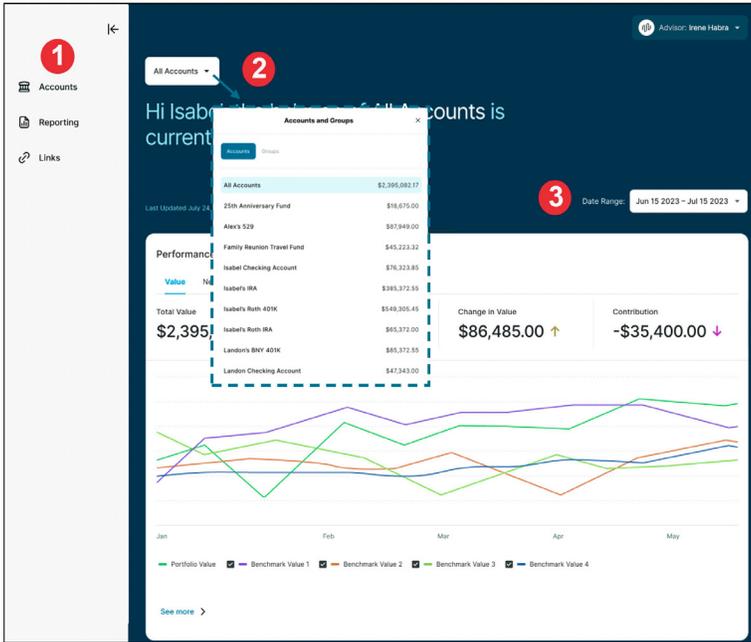
**NOTE:** After you have set up multi-factor authentication, each time you open the application, the following flow will be how you log in.



## CIRStatements Landing Page

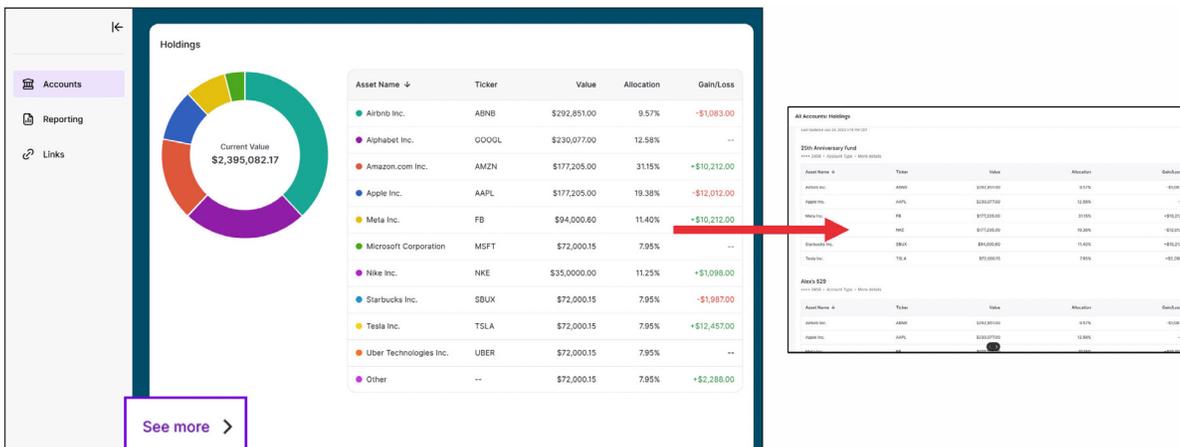
After logging in, you will land on the Accounts landing page where you will see:

1. A side navigation menu for **Accounts**, **Reporting**, and **Links**
2. A dropdown menu that displays each of your **Accounts** and **Groups** (formerly known as Portfolios)
3. The option to select a **Date Range** to view account data



After clicking **Accounts** from the navigation menu, you can scroll down to see an overview of **Holdings**, **Asset Allocation**, and **Activity**. Drill down and view more data on the Holdings and Activity by clicking **See more** in the bottom left corner of each section.

**NOTE:** You can do this for each individual account.



## How to View Individual Accounts

**Step 1:** From the landing page, scroll down in your dashboard to view individual accounts.

**Step 2:** Click on an account to open a dashboard page for that individual account.

**NOTE:** This screen will look like your overall accounts page. You can tell at the top of the page if you are viewing one individual account or your whole portfolio.

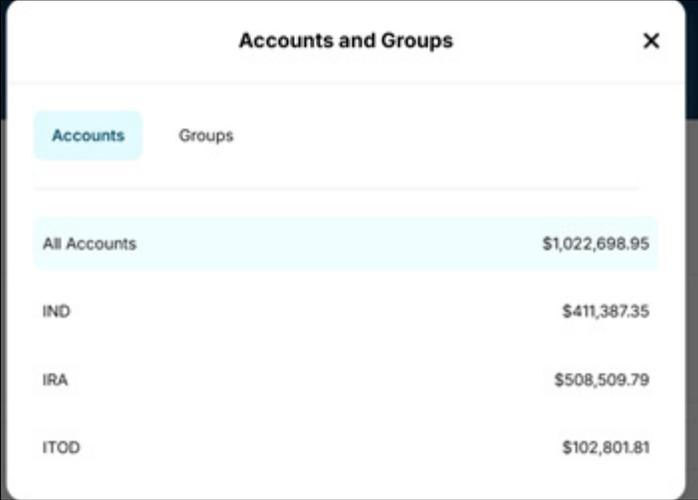
In addition to scrolling through your dashboard, you can click the Accounts drop down at the top of the page, from here you can click on individual accounts and the system will take you to the dashboard page for that account.

## How to View Groups (formerly known as Portfolios)

**Step 1:** If you have accounts grouped together, you can view those groups by clicking on the **Accounts** drop down at the top of the page.

**Step 2:** A window will open where you can click on **Groups**.

**Step 3:** Click on a group to access its specific dashboard.



The screenshot shows a window titled "Accounts and Groups" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "Accounts" (which is selected and highlighted in light blue) and "Groups". Below the tabs is a table with two columns: the first column lists account categories and the second column shows their corresponding balances. The "All Accounts" row is highlighted in light blue.

Account Category	Balance
All Accounts	\$1,022,698.95
IND	\$411,387.35
IRA	\$508,509.79
ITOD	\$102,801.81

## How to View and Run Reports

To view and run reports click **Reporting** from the navigation menu.

**NOTE:** This will open a familiar reporting screen. The functionality remains unchanged, and you will retain access to all the reports you previously had access to.

The screenshot shows the Reporting interface for a client named Blake Media. The top right corner identifies the advisor as Irene Habra. The main content area includes a 'Reporting' header, client and portfolio information, and a table of assets.

**Client:** Blake Media  
**Portfolio:** Blake Media (Created By FI)  
**Report / Package:** Holdings by Investor  
**Date:** 05 / 26 / 2023

**Protect Your Data:** Before saving a report to any device, please ensure that you have password protected the device.

**Buttons:** Preview, Export PDF

**Blake Media Contact Information:**  
 Blake Media, Pershing Llc, 1 Pershing Plz, 6TH FLOOR, Jersey City, NJ 07399  
 Solutions Center, PO BOX 320, JERSEY CITY, AR 28461, 828-883-8736  
 Blake Media, Date: 05/26/2023, Created: 08/11/2023

**Blake Media Account Details:**  
**Account Name:** BLAKE MEDIA  
**Account Number:** V99039306  
**Account Type:** Corporation  
**Managed Account Type:** 889\_RD1  
**Program:** Rep as Portfolio Manager

ASSET	TICKER	QUANTITY	PRICE (\$)	VALUE (\$)
AMERICAN BALANCED FUND CLASS A	ABALX	732.48	29.70	21,754.63
COLUMBIA SELIGMAN COMMUNICATIONS AND INFORMATION FD CL A	SLMCX	673.42	100.68	67,800.13
GEORGE PUTNAM BALANCED FUND CLASS A	PGEQX	453.78	27.00	12,252.11

## Personal Profile

Click your name in the bottom left corner to open the **My Information** dashboard.

The screenshot shows the 'My Information' dashboard. The left sidebar contains 'Reporting' and 'Links'. The main content area is split into 'Activity' and 'My Information' sections. A pink arrow points from the 'Isabel Tauro' name in the bottom left corner to the 'My Information' section.

**Activity Table:**

Account Name	Date	Asset Name	Action	Qty	Price	Value
Roosevelt Joint Acco...	May 10, 2022	Airbnb Inc.	Buy	16	\$43.32	\$1,333.12
Isabelle Brokerage	May 09, 2022	Rivian Inc.	Sell	20	\$32.90	\$161.31
Fred Trust	May 08, 2022	S&P 500 ETF	Buy	18	\$389.92	-\$3,899.77
Danielle Brokerage	May 06, 2022	Uber Inc.	Buy	56	\$34.46	-\$2,140.90
Roosevelt Joint Acco...	May 06, 2022	Proshares TR S&P M...	Cash Dividend Recov...	--	--	\$7,568.84
Roosevelt Joint Acco...	Apr. 27, 2022	Airbnb Inc.	Buy	16	\$43.32	\$1,333.12

**My Information Section:**

**Change password** ⓘ

**Personal information**

Email: [Redacted] Prefix: [Redacted] First Name: Jane  
 Middle Initial: S Last Name: Doe Date of Birth: 06/10/1984  
 Phone: [Redacted]

**Address**

Country: United States City: Fairhope Address 1: [Redacted]  
 State: Alabama Zip code: 36532

**Bottom Left:** Isabel Tauro

## Financial Professional Information

To find your financial professional contact information, hover over their name in the upper right corner.

The screenshot displays a financial dashboard interface. On the left is a navigation sidebar with 'Accounts', 'Reporting', and 'Links'. The main content area shows 'All Accounts' with a balance of \$2,395,082.17. A dropdown menu in the top right corner, labeled 'Advisor: Irene Habra', is open, showing a list of advisors: Irene Habra (Primary Advisor), Jared McDaniel, and Lisa Alfaro. Each advisor entry includes a 'View profile' link.



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