WELCOME TO CCONNECT

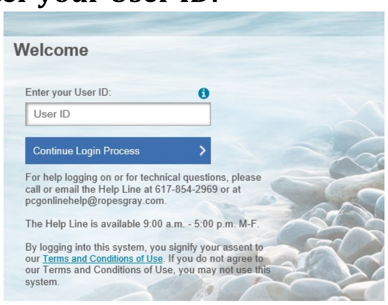
REFERENCE GUIDE

CCONNECT IS THE ONLINE PORTAL *for your Ropes Wealth accounts custodied at SEI Private Trust Company. The following Quick Reference Guide walks you through initial login to the portal and basic functionality of the site.*

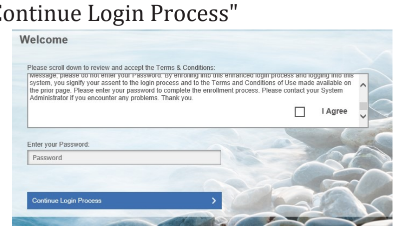
INITIAL LOGIN TO CCONNECT

Visit: https://ropesgray.cconnect.com

Enter your User ID:



1. Click "Continue Login Process"'
2. Accept the Terms & Conditions:
   Scroll to the bottom of the dialog and click "I Agree" and "Continue Login Process"



3. Enter the temporary password provided by your administrator.
4. A one-time password will be sent to your email; Enter the one-time password on the CConnect site and click "Continue Login Process"
5. Follow the prompts by entering a Personal Assurance Message and associated image. Click "Continue Login Process".
6. Select five security questions and provide an answer for each. Click "Continue Login Process".
7. Create a new password. It must contain the following:*
   i. Minimum of 8 characters
   ii. Uppercase letter(s)
   iii. Lowercase letter(s)
   iv. At least one number

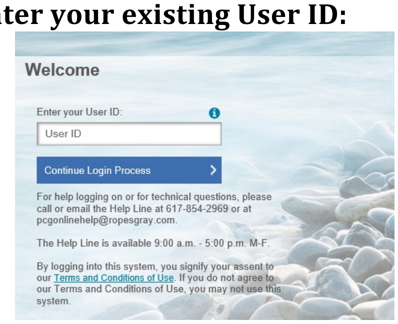
***Please note: Cannot contain the following characters: <, >, &**

If using a private computer, click the "Register this device". Then click "Continue Login Process".

FORGOT YOUR PASSWORD

Visit: https://ropesgray.cconnect.com

Enter your existing User ID:



1. Click "Forgot your password"
2. Answer two security questions
3. A one-time password will be sent to your email; Enter the one-time password on the CConnect site
4. Create a new password. It must contain the following:*
   i. Minimum of 8 characters
   ii. Uppercase letter(s)
   iii. Lowercase letter(s)
   iv. At least one number

Please note: Cannot contain the following characters: <, >, &

5. Click "Continue Login Process"'

TIP Save CConnect from the new homepage by clicking your browser's Bookmark or Favorite button.

NEED MORE HELP?

Contact your administrator or the online help team, available 9:00am - 5:00pm M - F:

Email: RWAOnlineHelp@ropeswealth.com
Phone: 617-854-2969

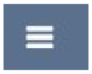
NAVIGATING THE WEBSITE

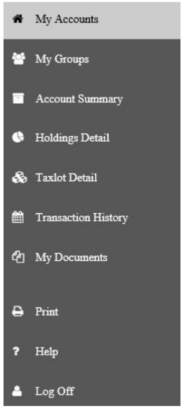
Home Page 'My Accounts'

1. A list of accounts can be found on the left side of the screen. The combined market value of all accounts is listed above.
   - A. Only the first five accounts appear, click "Show All" to view additional accounts.
   - B. A drop-down at the top right side of the page allows you to toggle between accounts

   - C. To View an additional account, click on the account name
2. Asset Allocation donut shows an aggregate of all accounts. To view an individual account, either click the account name on the left, or choose the account from the drop-down on the top right
   - A. A list of holdings can be viewed by clicking on the "Holdings Detail" link under the donut.
3. Recent Transactions on the bottom left will show all account transactions, to view more click “Transaction History”
   - A. To view an individual account, either click the account name on the left, or choose the account from the drop-down on the top right
4. Additional Options can be found by clicking on the Menu icon at the top left corner of the page

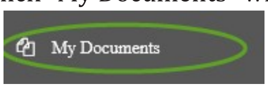
   
5. Click on any of the items in the Menu Bar to access additional information related to your accounts

TIP Avoid using your brower's "Back" button; instead, navigate to a page from the Menu Bar.

ACCESSING YOUR STATEMENTS

1. Click "My Documents" within the Menu Bar

2. Click "Statements" to view a list of statements, then filter the results to view statements from prior time periods.

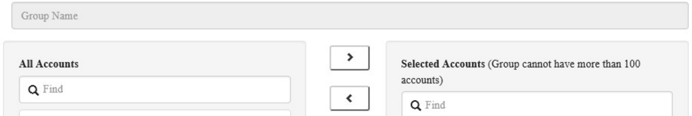
   

GROUPING ACCOUNTS

1. Click "My Groups" within the Menu Bar

2. Create a Group Name and add relevant accounts by selecting the account name from the list on the left and clicking the right arrow. Accounts can be removed from group by clicking the left arrow.



LOGGING OFF

1. To securely sign out of your session, click "Log Off" from the Menu Bar.

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