



MAY 2025

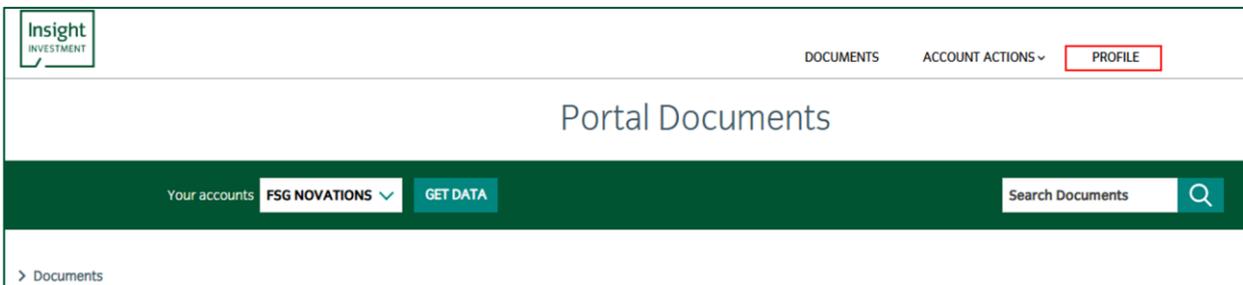
# INSIGHT CLIENT PORTAL: A GUIDE TO THE PROFILE PAGE

## INTRODUCTION

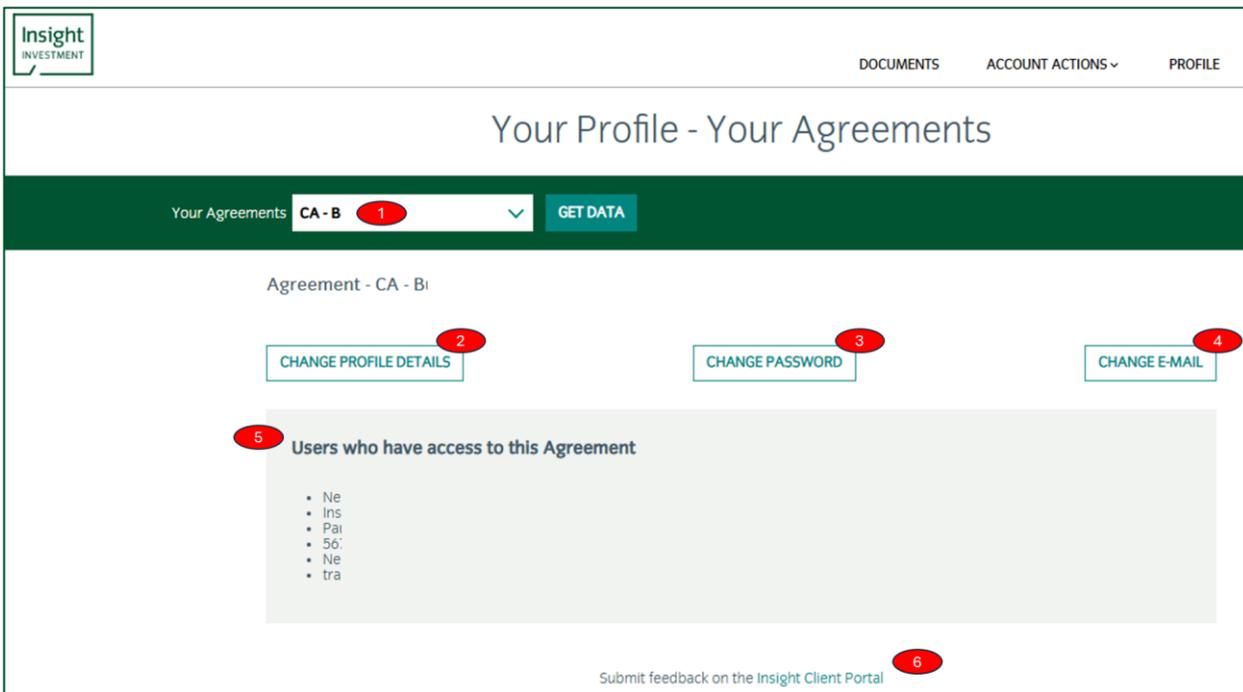
THIS USER GUIDE PROVIDES AN OVERVIEW OF THE FUNCTIONS AVAILABLE ON THE CLIENT PORTAL PROFILE PAGE.

## NAVIGATE TO THE PROFILE PAGE

Click on the **Profile** option in the menu bar at the top of the screen:



The profile page will open:



The image above shows the Profile Page for a sample user.

There are 6 features available on this screen:

1. **Your Agreements**: This drop-down list will contain a list of all the Client Agreements that you have access to. If you have access to multiple Client Agreements, then you will be able to select one from the drop-down list and click Get Data to retrieve the list of users who have access to the selected Agreement.
2. **Change Profile Details**: Click on the button to update some of your user details.
3. **Change Password**: Click on the button to change your password associated with your Client Portal account.
4. **Change E-Mail**: Click on the button to change the email address associated with your Client Portal account.
5. **User who have access to this Agreement**: A list of Client Portal Users who have access to this Agreement. If you see anyone that you do not believe should be able to access this Agreement, then please let your Insight Investment Team know immediately.
6. **Submit feedback on the Insight Client Portal**: Click on this link if you wish to provide us with feedback about the Insight Client Portal.

## CHANGE PROFILE DETAILS

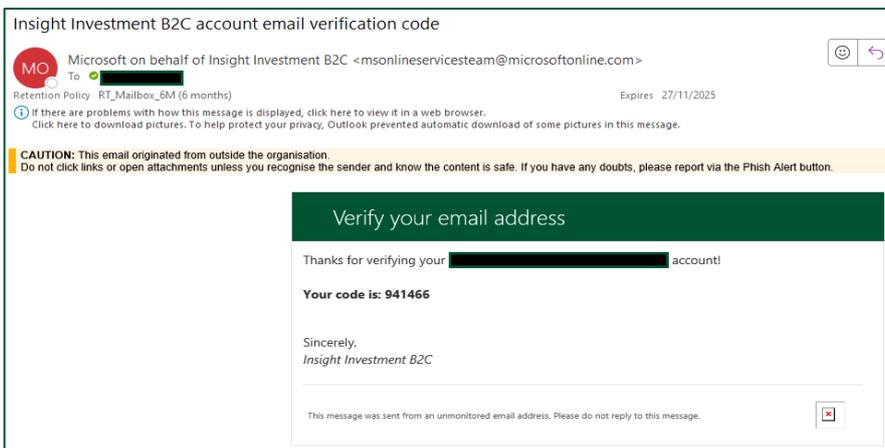
---

Click on the Change Profile Details button:

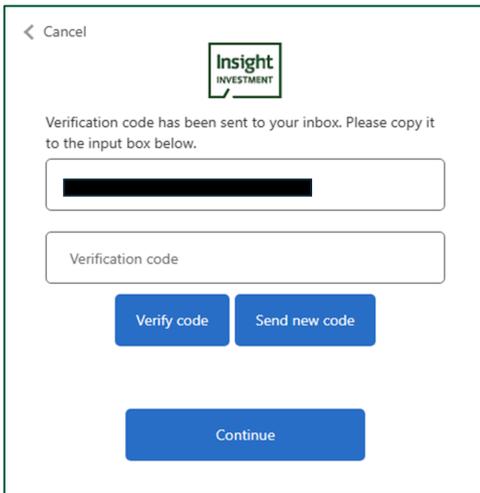


Before you can proceed you will need to verify your email address. The verification window will open with your email address populated:

Click the **Send verification code** button and the portal will send an email with a verification code to your registered email address:



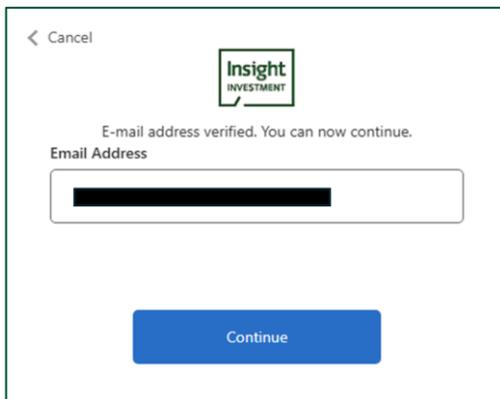
Type the Verification code into the box on the screen and click **Verify Code**.



The screenshot shows a mobile app interface for Insight Investment. At the top left is a back arrow and the word "Cancel". The Insight Investment logo is centered at the top. Below the logo, the text reads: "Verification code has been sent to your inbox. Please copy it to the input box below." There are two input fields: the first is a blacked-out box, and the second is labeled "Verification code". Below these are two blue buttons: "Verify code" and "Send new code". At the bottom is a larger blue button labeled "Continue".

If you haven't received a verification code, then firstly check your spam/junk mailbox or click the **Send new code** button. If you do not receive a code, then please contact your Insight Investment client team.

When you have successfully verified you will receive a confirmation message.



The screenshot shows a mobile app interface for Insight Investment. At the top left is a back arrow and the word "Cancel". The Insight Investment logo is centered at the top. Below the logo, the text reads: "E-mail address verified. You can now continue." Below this is a label "Email Address" and a blacked-out input field. At the bottom is a blue button labeled "Continue".

Click continue to be taken to your profile details:



The screenshot shows a mobile app interface for Insight Investment. At the top left is a back arrow and the word "Cancel". The Insight Investment logo is centered at the top. Below the logo are five input fields, each with a label and a blacked-out value: "Given Name", "Surname", "Display Name", "Company Name", and "Insight Investment Contact". At the bottom is a blue button labeled "Continue".

Once you have finished editing the details then click Continue to finish.

## CHANGE PASSWORD

---

Click on the Change Password button:



You will be prompted to verify your account using the authenticator app that you used to login to the portal and click **Verify**:

A mobile app screen for account verification. At the top left is a back arrow and the word "Cancel". In the center is the "Insight INVESTMENT" logo. Below the logo is the instruction "Enter the verification code from your authenticator app." A text input field contains the placeholder "Enter your code." Below the input field is a blue button labeled "Verify".

The **Change Password** window will open, fill in your old and new passwords and click **Continue** to complete the password change.

A mobile app screen for changing a password. At the top left is a back arrow and the word "Cancel". In the center is the "Insight INVESTMENT" logo. Below the logo are three text input fields: "Old Password", "New Password", and "Confirm New Password". At the bottom is a blue button labeled "Continue".

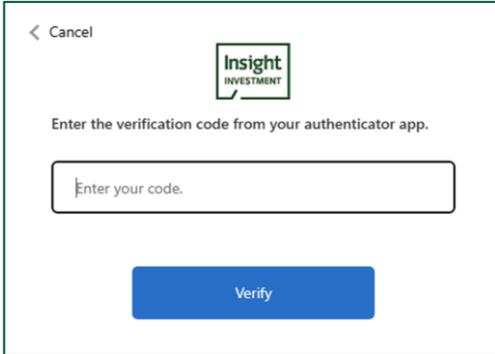
## CHANGE E-MAIL

---

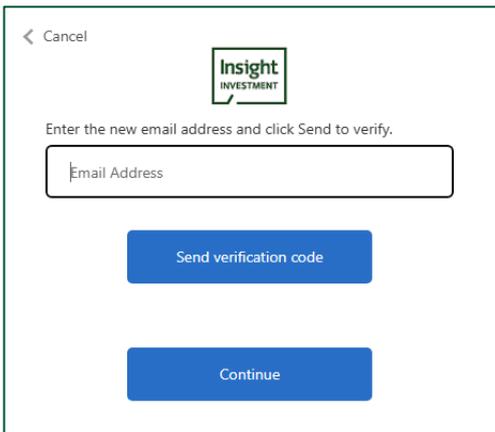
Click on the **Change E-Mail** button:



You will be prompted to verify your account using the authenticator app that you used to login to the portal and click **Verify**:

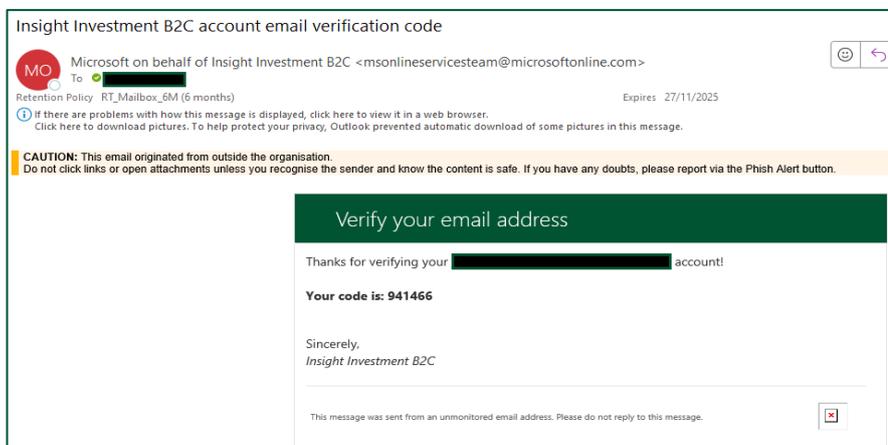


The next screen will allow you to enter your new email address. Type in your new address and click **Send verification code**:



Insight will send a verification email to the new email address

Enter this code in the box on the portal screen and click Verify Code.



Click Continue on the next screen to complete the request

Your Insight Client Team will need to review your request so you will not be able to login immediately with your new email.

You will be presented with the following screen:

*NOTE: If you need immediate access to the Client Portal then click on the Revert E-Mail button to revert back to your previous email address. You will need to make another Change Email Address request if you still need to change your email address.*

When your Insight Client Team have completed their review you will receive an email to your new email address confirming that your email has been changed. You can now login to the Insight Client Portal using your new email address and previous password.

**From:** Insight Investment Web Notification <[noreply@web.insightinvestment.com](mailto:noreply@web.insightinvestment.com)>

**Date:** 21 May 2025 at 10:40:09 BST

**To:** [REDACTED]

**Subject:** Your request to amend the email address registered with the Insight Investment portal

Thank you for updating your email address. This has now been approved and you should use your new email address when next logging into the portal.

If you have any questions or comments about the Insight Client Portal, then please contact your Client Services Team.