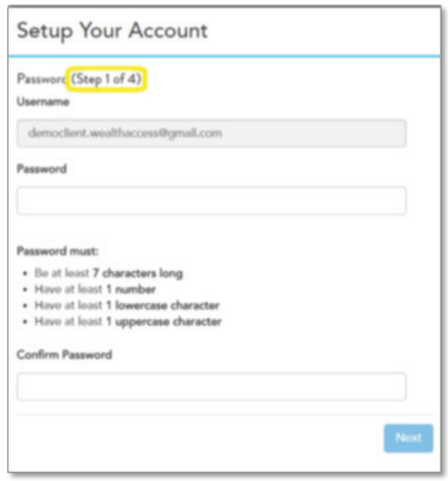
HAVERFORD direct

Quick Access Guide

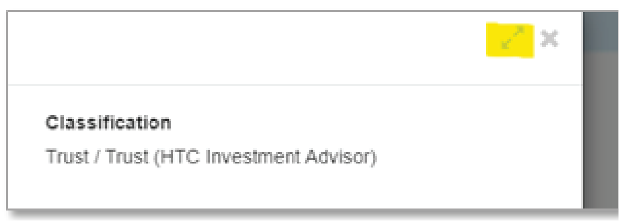
Logging in the First Time

1. You will receive an email inviting you to access Haverford Direct powered by Wealth Access.
2. Click the "Set Up Your Account" button in the email.
3. Once on the new page, enter your email address into the Username field.
4. Follow the prompts to establish a password, security questions, and your account preferences.
5. After your account has been set up, you will use your email address and password to log in through the mobile app or by visiting https://haverforddirect.wealthaccess.com/ for return visits to the portal.



Viewing Account Details

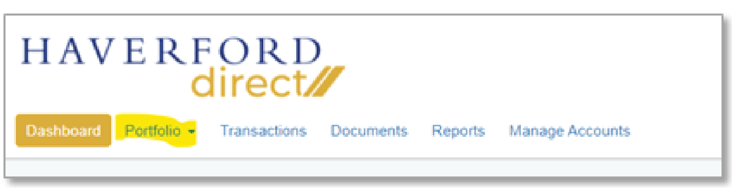
1. Once logged in, click on the Dashboard to view a list of your accounts. For a quick view of account information, select the Details tab next to the account you wish to view. Note: To expand the table view, click on the opposite arrows icon (shown below, right).



From here you can view detailed account information such as:

- Holdings
- Historical Values
- Diversification
- Gains & Losses
- Transactions
- Documents

2. You can also view account information by clicking the Portfolio tab in the menu along the top of the page.

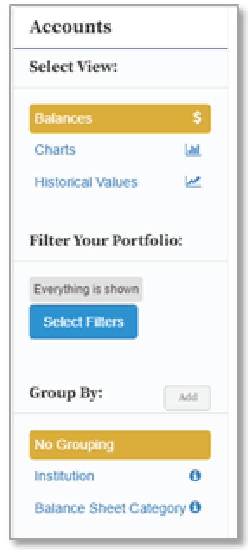


From here you have the ability to view:

- Accounts
- Holdings
- Portfolio Diversification
- Gains & Losses
- Market Pricing

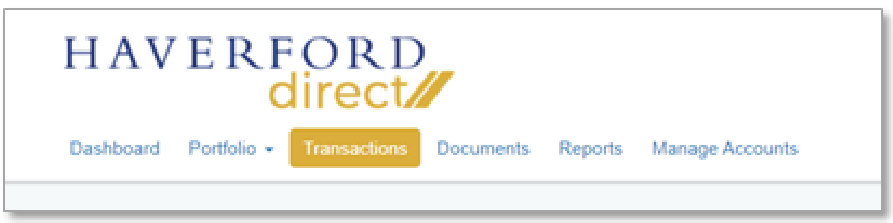
  (Note: Prices are delayed by 15 minutes; please refer to the last updated time stamp.)

In this view, users can Select View, Filter Details, and/or Group data.
Note: This functionality is consistent throughout each data set.

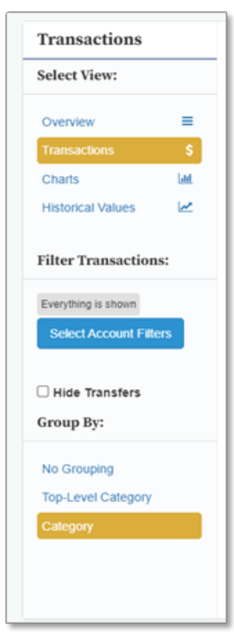


Viewing Transactions

1. View transaction detail by selecting the Transactions tab on the banner.

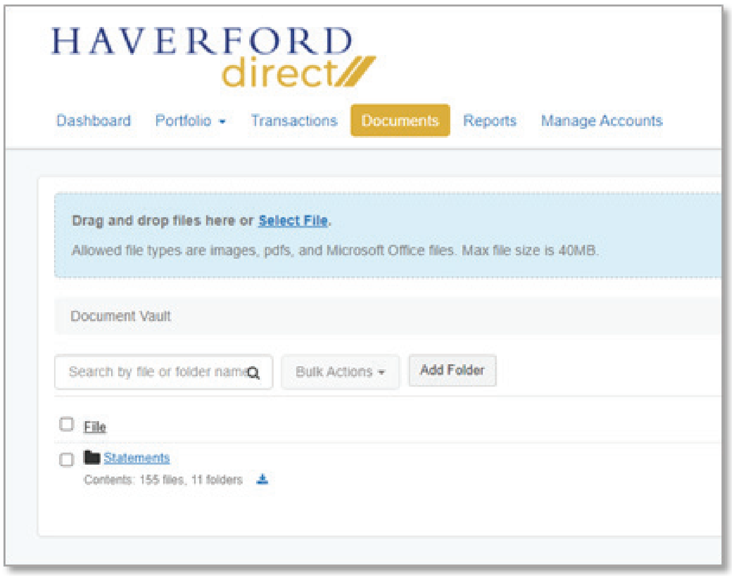


2. You can then View, Filter, and Group transaction data.

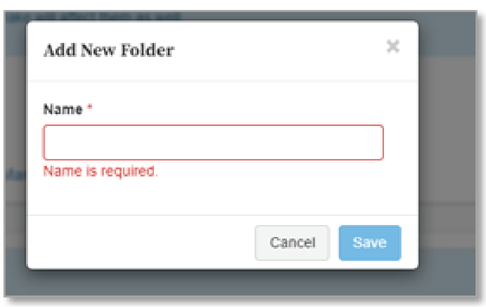


Utilizing the Document Vault

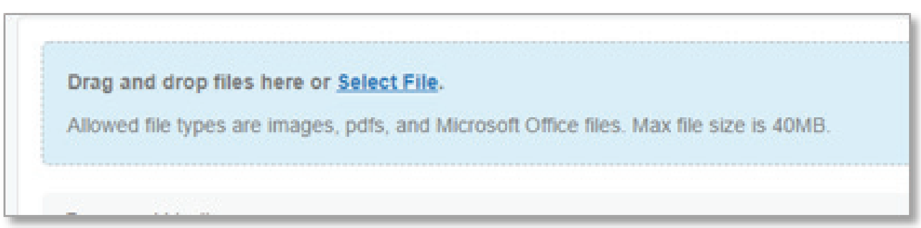
1. Click on the “Documents” tab in the banner to access the Document Vault. The Document Vault will contain your monthly and quarterly statements, as well as annual tax documents. You can also use the vault to store other important documents or share files with your Portfolio Management team securely.



2. To add a new folder
   a. Select Add Folder
   b. Enter a name and click Save



3. To add a document, drag and drop the file from your device or click on the Select File link to navigate to the desired file.



Additional Support Materials:

A library of support and help materials can be accessed from within the portal at any time. Click on the Help button next to your username when logged in to the portal to browse or search.

Should you experience any issues or if you have questions, please reach out to your Relationship Management team or the Haverford Direct Client Experience Manager, Carrie Lauer, at clauer@haverfordquality.com or 484-253-6641 during regular business hours for help answering your questions.