

# User Guide for Online Client Access

## Access codes and Passwords

Client Access Number and Password will be sent in separate emails or via post to you once your account has been established. Please contact your Adviser if you have not received either of these details.

## Logging in

Access to your online Fitzpatricks Managed Discretionary Account is via the Fitzpatricks website, [www.fitz.com.au](http://www.fitz.com.au) or your Adviser Website.

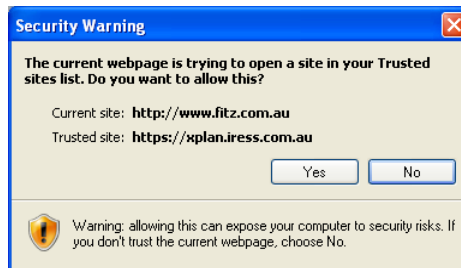
- From the Fitzpatricks home page click on 'Client Log-in' icon.



- Click on 'MDA Reports (with HSBC Custody)'.



- The following 'Security Warning' may appear, to continue click on 'Yes'.



- Enter your 'Client Access Number' as the 'User ID'.
- Enter the provided 'Password'.

**Client Access**

**Client Access Login**

User ID:

Password:  [Forgot Password?](#)

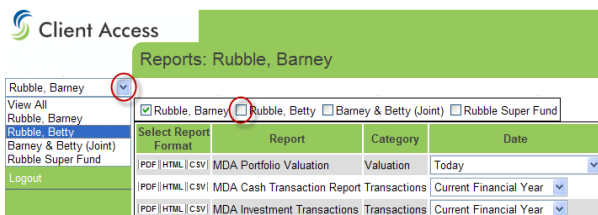
You will be taken to the main page of your Client Access.

## Navigating Your Way Around

### Selecting your Entities.

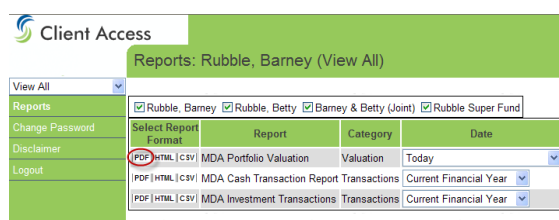
There are 2 options to select and view your entities (if applicable):

- Option 1: Click on the drop down arrow at the top of the left hand menu to view all entities.
- Option 2: Click in the small box beside the entity, to view all click in all the small boxes.



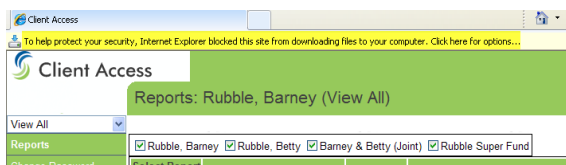
### Viewing your Reports.

- Click on the Entity you wish to view (see above instructions).
- Select the report format by clicking on the applicable button beside the report you wish to view. Options are: PDF, HTML or CSV.



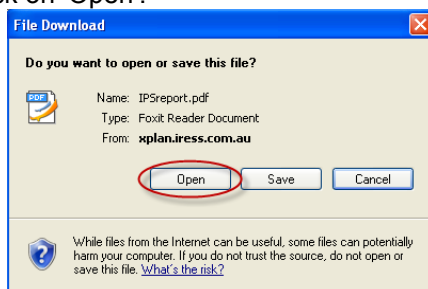
- Click on 'OK' in the pop up window stating 'Your report is being generated, please wait...'

**Helpful Hint!** Internet Explorer may block downloading from this site, as below:



Click on the message in yellow towards the top of the screen then click on 'Download file', you will need to repeat the steps above to download the report.

- If a pop up window appears, click on 'Open'.



The report will open.

**Please note!** If anything in the report is unclear please contact your Adviser.

### Logging Off

It is important to log off after every session.

- From the left hand menu click on 'Logout'.

## Disclaimer

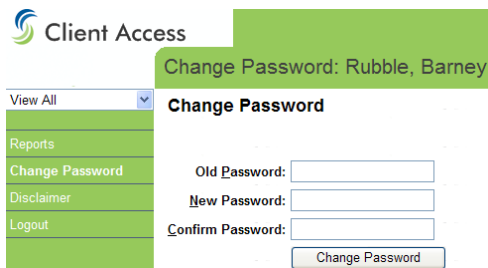
Fitzpatricks disclaimer is located under 'Disclaimer' from the left hand menu. Please take the time to read this disclaimer.

## Changing password

It is very important to change your password the first time you log in and any time you believe someone else may be aware of your password. Please follow the steps below:

**Please note!** Your password is case sensitive so you should use upper and lower case letters, be at least 8 characters long and contain at least one upper case letter plus one number.

- From the left hand menu click on 'Change Password'.



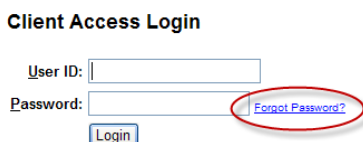
The screenshot shows the 'Client Access' interface. On the left is a green sidebar menu with options: View All, Reports, Change Password, Disclaimer, and Logout. The 'Change Password' option is highlighted. The main content area is titled 'Change Password: Rubble, Barney' and 'Change Password'. It contains three input fields: 'Old Password:', 'New Password:', and 'Confirm Password:'. A 'Change Password' button is located at the bottom right of the form.

- Enter your current password as 'Old Password'.
- Enter your chosen password in 'New Password'.
- Enter your chosen password in 'Confirm Password' (to confirm).
- Click on 'Change Password'.

## Forgotten your password

From the Client Access page (refer above to 'Logging in'):

- Click on 'Forgot Password?' beside the Password box.



The screenshot shows the 'Client Access Login' form. It has two input fields: 'User ID:' and 'Password:'. A 'Login' button is positioned below the 'Password:' field. A blue link labeled 'Forgot Password?' is located to the right of the 'Password:' field and is circled in red.

- Enter your 'Client Access Number' in the 'User ID' field
- Click on 'Send'.

A new password will be sent to your email address, please remember to change the password once you are able to log in.

If you do not have an email address, please contact your Adviser to arrange a new password.

If you have any questions, please contact your Adviser.