# e-view® Fact Sheet

Mesirow Financial's e-view® has been enhanced to provide convenient, real-time and secure access to useful information with an improved format. Key features of the new system are outlined below.

## Real-Time Account Information

You don't have to wait for a monthly statement to monitor your account activity. The *My Accounts* tab of e-view® allows you to get updates as often as you like and to view customized reports, now with enhanced sorting capabilities. You can also access up-to-date information about your account(s), including:

- *Portfolio Summary* — account balances by category, reflecting 20-minute delayed prices when available
- *Activity Summary* — account activities, including trade detail
- *Portfolio Positions* — account positions and holdings, reflecting 20-minute delayed prices when available
- *Order Inquiry* — the current day's open, executed and cancelled orders
- *Check/Debit Card Detail* — money market account transactions, check-writing details and debit card activity
- *Income Summary* — the current month's account income

## More Ways to Get Help

*Online Help* has been significantly enhanced to contain comprehensive information about using e-view®. It includes:

- Detailed information about all e-view® functions and reports
- Troubleshooting help to address problems with logging in, printing and viewing
- Frequently asked questions and answers

If you have problems with printing, resolution, browser version conflicts or error messages, dedicated technical support is available at 866-MESIROW.

As always, you may call your Investment Executive if you have any questions regarding e-view®, your account(s) or to purchase, sell or transfer securities.

*Please note that you may not currently buy or sell securities, send time-sensitive instructions to Mesirow Financial, transfer funds or securities, transmit personal credit information or change your account address using Mesirow Financial's* e-view® .

## Markets at Your Fingertips

The *Quotes & Market Data* tab contains news and information about the financial markets, as well as helpful tools. Use it to link to:

- Delayed quotes, with multiple symbol lookup
- Market snapshots and statistics
- Recently released economic reports
- Option chain lookup
- Market news and commentary

In addition, you'll find *Portfolio Tracker*, a tool that allows you to track the performance of hypothetical portfolios and securities outside of those in your accounts.

## Easy Account Activation

Activating your account online takes just a few simple steps.

1. Go to the login page and click under *Register for access*.
2. You will be prompted to enter
   - Your account number
   - The social security number associated with the account
   - A password, which will be applied to all the accounts in your mailing household*
   - A password reminder phrase for use in case you forget your password
   - An e-mail address

   Keep in mind that data encryption is used to ensure security.
3. Click submit — and that's it. Your account will immediately be activated so that you can log in using your account number and the password you selected.

* Contact your Investment Executive if you wish to consolidate your accounts into a household. Access to multiple accounts is consistent with current written statement mailings to ensure privacy. If you currently receive a separate mailing for each of your account statements, you will need a separate password to view each account online.

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