

Accessing your client website securely.

This login guide is designed to help Rockland Trust Investment Management Group (IMG) clients navigate the new login process.

What you need to know.

You will be required to enter your User ID, Password and a one-time PIN every time you login.

You can receive your One-Time PIN (OTP) either via your phone or an Authenticator Application.

Phone number

Your ID and password alone will not be enough. A one-time PIN will also be required.

Authenticator app

We recommend using an Authenticator Application to obtain a One-Time PIN (OTP). This is similar to getting an OTP over a phone, but more secure and quicker since it does not require any network connectivity between your device and the SEI system. (See page 2)

Forgot your password

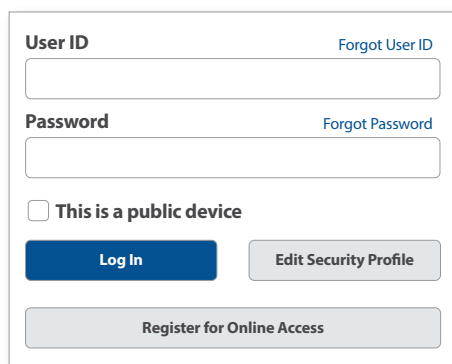
You must reset your password from the Forgot Password link on the login page; a verified phone number or authenticator app and email address are required. The IMG team cannot reset passwords on your behalf.

One-Time PIN (OTP)

The IMG team can't generate a OTP or view your previously generated OTP.

New User Validation

New users must validate their email and phone number to set a password and login.



The form contains the following elements:

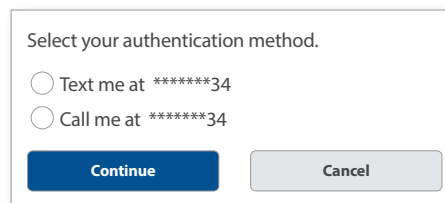
- User ID** field with a [Forgot User ID](#) link.
- Password** field with a [Forgot Password](#) link.
- ☐ **This is a public device**
- Log In** button
- Edit Security Profile** button
- Register for Online Access** button

- 1 Click **Register for Online Access** and follow prompt to enter email, then click **Continue**
The email address entered must match the one at the time of creation; if it's incorrect, contact your account manager to update it. An alert will appear if an invalid email address has been entered.

- 2 Go to the email and follow the directions in it to complete the registration

If you see this email and do not expect it, call your account manager as it may be an indication of fraudulent activity.

- 3 Select method of authentication and click **Continue**



The form contains the following elements:

- Select your authentication method.
- ☐ Text me at *****34
- ☐ Call me at *****34
- Continue** button
- Cancel** button

This is the phone number assigned at the time your account was created; if it's incorrect, contact your account manager to update it.

- 4 Enter OTP from your text or call
- 5 Read Terms and Conditions of Use, click **I agree**, then click **Continue**
- 6 Create and re-enter a password, then click **Continue**

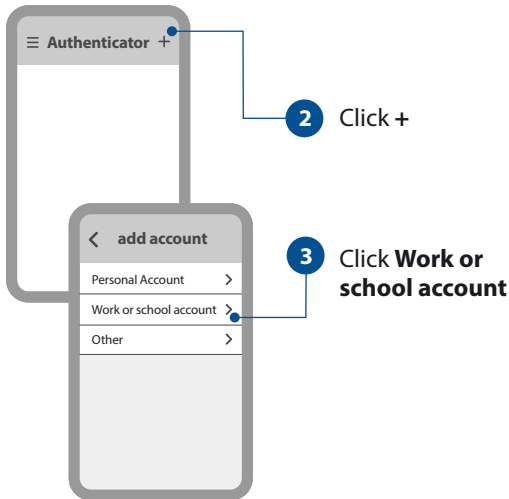
After the password is set, you will be prompted to optionally add an Authenticator Application. Its use is highly recommended for security purposes.

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Authenticator Application Setup

The use of an Authenticator Application to obtain a **Time-Based One-Time PIN (TOTP)** is highly recommended for security purposes. Typically, these applications, like **Microsoft Authenticator** and **Google Authenticator**, can be used via a mobile device.

- 1 Download, install your preferred authenticator application and open app on your device if you do not already have one downloaded



- 4 From your Rockland Trust Investment Management Group login screen, enter User ID and Password, then click Edit Security Profile.

Use to:

- Change your password
- Change your phone number
- Add an authenticator application

- 5 Select **authentication method** and click **Continue**
You will receive a text message or call with a One-Time PIN to enter. If you have an authenticator application set up, you will choose this method.

- 6 Enter the **One-Time PIN** and click **Continue**

- 7 Select **Set Up an Authenticator Application**, then click Proceed

Security Profile

User ID: UserID1 [Edit](#)

Password: ***** [Edit](#)

Email: email@co.com [Edit](#)

Phone: 1-111-111-1111 [Edit](#)

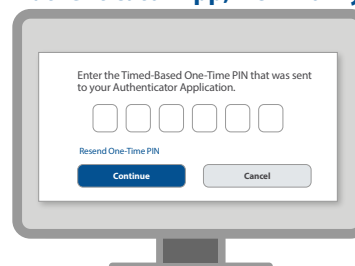
[Set Up an Authenticator Application](#)

Proceed



- 8 Open the Authenticator App on your mobile device and scan the **QR Code** that is presented on your computer screen

Be sure to scan the QR code from within the Authenticator App, NOT from your device's



- 9 Enter the PIN from Authenticator Application and click **Continue**

This PIN is usually valid for 30 seconds.

If this PIN is not entered, the Authenticator will not be activated, but will appear on the Edit Security page.

If the Authenticator Application is deleted, a new phone is used, or a new version of the Application has been installed, follow the initial setup instructions again.

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Login

After completing the new user validation steps, follow this process to access the application.

- 1 Go to **<https://rocklandtrust.ecx.seic.com/>**
- 2 Enter **User ID** and **Password**, and then click **Log In**

The screenshot shows a login form with the following elements:

- User ID** field with a [Forgot User ID](#) link.
- Password** field with a [Forgot Password](#) link.
- ☐ **This is a public device**
- Log In** button
- Edit Security Profile** button

Annotations on the right side of the form:

- Use to:**
 - Change your password
 - Change your phone number
 - Add/Remove an authenticator application

- 3 Select **authentication method** and click **Continue**
You will receive a text message or call with a One-Time PIN to enter. If you have an authenticator application set up, you will choose this method.
- 4 Enter the **OTP** from your text, call, or Authenticator Application and click **Continue**

The login process has been successfully completed. You'll now have access to the desired application.

Do not bookmark URLs.

A bookmark must contain the actual URL desired and not the redirected URL that is displayed with the login page. When adding a new bookmark or favorite, type the full URL:
<https://www.privatewealth.seic.com>

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Log In Maintenance - Edit Security Profile

User ID [Forgot User ID](#)

Password [Forgot Password](#)

☐ **This is a public device**

Log In **Edit Security Profile**

Register for Online Access

Security Profile

User ID: UserID1

Password: ***** [Edit](#)

Email: email@co.com [Edit](#)

Phone: 1-111-111-1111 [Edit](#)

Authenticator Application [Remove](#)

Note: After an Authenticator Application is removed, you will be able to add a new one.

Proceed

- 1 Enter **User ID** and **Password**
- 2 Click **Edit Security Profile**
- 3 Select **authentication method** and click **Continue**
- 4 Enter **OTP** from your text, call, or Authenticator Application, then click **Continue**
- 5 Choose which criteria you would like to update and then **follow the directions below**.

Change Password

A password can be changed at any time.

- 1 Click **Edit**
- 2 Enter **Current Password**
- 3 Enter and re-enter **New Password** and click **Save**
- 4 Click **Continue** on the confirmation screen
- 5 Click **Proceed** on the Security Profile Screen

When your password is changed, a confirmation email will be sent. If you see this email and do not expect it, you should call the firm as it may be an indication of fraudulent activity.

Change Phone Number

A phone number can be changed at any time.

- 1 Click **Edit**
- 2 Enter **Country** and **New Phone Number** and click **Update**
- 3 Verify phone number by entering **OTP** from your text or call and click **Continue**
- 4 Click **Continue** on the confirmation screen
- 5 Click **Proceed** on the Security Profile Screen

When your phone number is changed, a confirmation email will be sent.

As the phone options available are for the “old” phone number, a user must have previously paired an Authenticator Application, or still have access to the old phone number.

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Error messages and troubleshooting

Follow these steps when you experience these log in error messages.

! Alerts appear here when there are log in issues.

Error message appears here when there are issues with your log in attempt

User ID

Forgot User ID

Password

Forgot Password

☐ This is a public device

Log In

Edit Security Profile

Forgot User ID

- 1 Click **Forgot User ID**
- 2 Go to your email address on file to view the email and retrieve your User ID sent to the email address on file

Forgot Password

- 1 Click **Forgot Password**
- 2 Enter email, then click **Continue**
- 3 From the email, click **Reset My Password**
- 4 Select method of authentication
- 5 Enter **OTP** from your text, call, or Authenticator Application
- 6 Enter and re-enter your new **Password** and click **Continue**
- 7 From the confirmation screen, click **Continue** to go to the Log In screen

Invalid Combination

Alert appears if the User ID or Password entered is incorrect; try again or click **Forgot Password** to continue

Invalid combination of the User ID & Password or your account has been suspended.

Locked Account

Alert appears if too many log in attempts were made. Click **Forgot Password** to continue.

Your account has been locked.
Click "Forgot Password" to reset your Password.

Password Expired

Alert appears if your password expired. Click **Forgot Password** to continue.

Your Password has expired.