



COVINGTON INVESTMENT ADVISORS, INC.

301 East Main Street

Ligonier, PA 15658



General Overview of the new client portal:

If you have previously accessed the client portal, you will notice that there are some differences in presentation and some additional features. This document will help you better understand the new portal and help you understand the new metrics offered by the updated interface.

For starters, we have not removed any of the reports that were found in the previous portal. Though some have been renamed. Most notably, the total market value widget that was previously displayed is now titled “Net Worth”.

We recognize the impact of the insight that these reports provide to our clients and as such they have remained an important element within our portal.

Additionally, Clients can more easily gain insight to their performance across multiple accounts using the funnel feature. In the top right corner of the portal and app there will be a funnel icon, when you click on this you can choose to view performance as a household (across all accounts) or select one of your accounts to view.

Additionally, in hopes of providing an even greater insight to our work and your portfolios performance, we have added several new widgets to our client portal.



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New Widgets:

1. Top Holdings

This new display gives clients a view of their largest holdings as a percentage of their portfolio, it provides clients with an understanding of what they are currently invested in and helps them to know which equities and bonds they should be watching

2. Activity

In seeking to provide greater transparency, clients can now track activity within their accounts. By linking the portal to our Custodians at Charles Schwab, the report shows when deposits have been received and when trades have occurred in their portfolios. As clients take note of this it is our hope that this feature will make investing with Covington more collaborative.

3. Realized Gains and Losses

This page is a transaction page which tracks all realized gain/loss transactions in the account over a specified period.

4. Projected income

This page keeps clients informed on the income they can expect from projected dividends, principal repayments, and coupons. This will give clients insight into the direct income that results from their investments.

5. Money Guide Pro

For clients who have utilized our money guide pro planning software, an additional page will be added to the portal which monitors the status of their plan and the likelihood of its success. It tracks your spending towards your various retirement goals, needs, and wants, and tells you where you could spend more or less.

6. Documents

Clients can now access their quarterly reports, monthly billing notifications, and other legal documents through our portal and app allowing clients with easy access to their investment performance.

With this going out around the end of Q1, your quarterly reports will soon be available on both platforms, so we highly encourage clients to login and take a look at those, so we can continue to receive feedback from our clients about investment performance and changing needs.



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Forgot your password?

If you forget your password there is an easy fix,

1. Click on the “Recover it here” link at the bottom of the login page.
2. The app will then send you a verification code and then will send you an updated password to login with.

Want to change your password?

1. This cannot be done using the app, it will have to be completed with the portal on your desktop or web browser.
2. From the home page on the portal, click on your initials icon in the top right corner, then click on the Settings and security tab, then click on the security settings tab.
3. Here you will see your login credentials, you can then push the change button next to your password to update your login credentials.

Overview of each way you can view the client portal

1. Web Browser: The portal may look new but fear not, it can still be found in the same place for the quickest access you can access the login page on our website home page with the link in the top right corner.
2. The New App: We at Covington want to stress to our existing portal users that the app is not a replacement for the portal. It is meant to complement it. The new app allows clients to take their existing portal on the go. Having it in your back pocket means you can take a look at it at any time of the day and in any place.