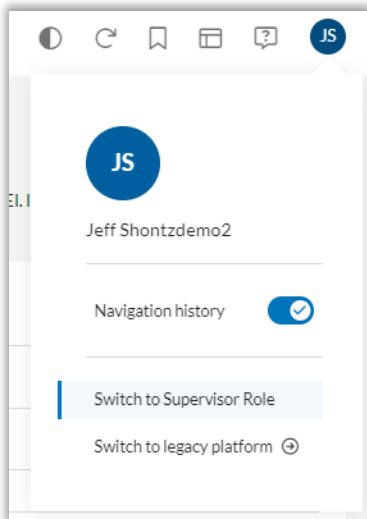




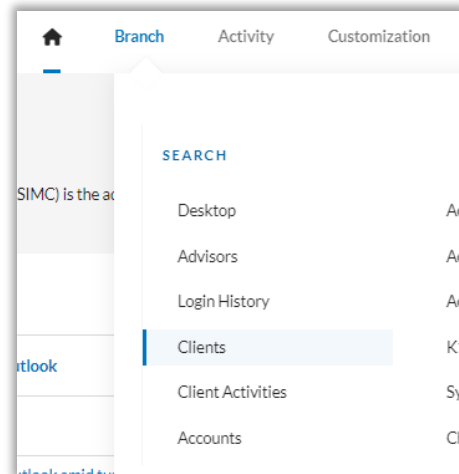
The Supervisor Role.

If you have firm level access, you will want to switch your view to the Supervisor Role so that you will be able to see all of the Clients and Accounts within the firm.

Select your profile icon and select Switch to Supervisor Role.



A Branch menu will appear with a Clients option displaying in the Search section. This is where you will be able to view a full list of the Clients.

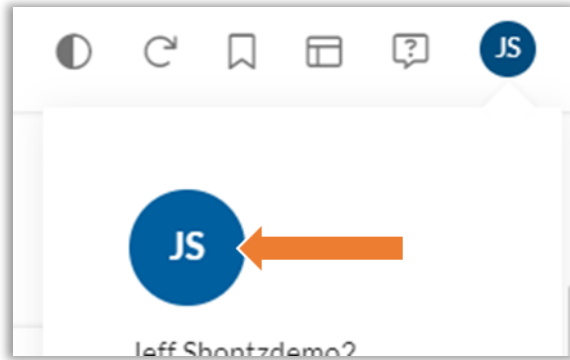


The full Client List will display.

Primary Owner ↑	Count	Advisor	Client Title	Accounts	Market Value ¹
AdvisorGuided, Allison	:	Advisor, SEI		1	\$ 465
AdvisorGuided, Andrew	:	Advisor, SEI		2	20,704
AmericanFund, Arthur	:	Advisor, SEI		2	429
DistributionFocused, Dennis	:	Advisor, SEI		1	51,634
EFE Barbara	:	Advisor, SEI	EFE HH	7	2,987

You can also set the Supervisor Role as your default view so that each time you access Advanced Client Reporting, you will see the Branch menu.

Select your profile icon and then select the larger profile icon.



Within the Settings section, select the edit button and then check the box next to **Direct login to sponsor console**. This will set the Supervisor Role as your default view.

