

# Linking accounts to a username in ClientEXP

- Once your client logs into ClientEXP, they will be taken to the Portfolio Snapshot page below. To link another account to this username, click on Profile, then the Accounts tab.

The screenshot shows the Hilltop Securities Portfolio Snapshot page. The browser title is "Portfolio Snapshot - Windows Internet Explorer". The address bar shows a URL from test-preprod.myview.swst.com. The page features the Hilltop Securities logo and a navigation bar with links for Notices, Profile, and Log Out. A red arrow points to the Profile link. Below the navigation bar are tabs for PORTFOLIO, EDOCUMENTS, REPORTS, RESEARCH, and TOOLS. The main content area displays the Portfolio Snapshot with a net value of \$30,055. A circular chart shows "Basic Accounts" at 100%. Below this is a table titled "Portfolio of Accounts" with columns for Name, Market Value, and Net Change. The table lists "Basic Accounts (1)" with a market value of \$30,055.45 and a net change of -\$646.54 (-2.44%), and "Retirement (1)" with a market value of \$0.00 and a net change of \$0.00 (0.00%). Buttons for "MANAGE GROUPS" and "VIEW DETAILED SUMMARY" are at the bottom. The right sidebar contains sections for "Get Quick Quote", "Recent Quotes", "Market Watch Lists", and "Headlines".

**Portfolio Snapshot**

**Portfolio Net Value**

**\$30,055**

CASH AVAILABLE: \$6,720 | MARGIN BUYING POWER: \$16,417

**Portfolio of Accounts**

NAME	MARKET VALUE	NET CHANGE	ACTIONS
Basic Accounts (1)	\$30,055.45	\$-646.54 -2.44%	ACTIONS
Retirement (1)	\$0.00	\$0.00 0.00%	ACTIONS

MANAGE GROUPS | VIEW DETAILED SUMMARY

Get Quick Quote

Enter Symbol

Recent Quotes

Name	Price	Change	Volume
-- TYPE A SYMBOL ABOVE FOR A QUICK QUOTE --			

Market Watch Lists

Overview

S&P 500	1151.13	0.07 (0.01%)
NASDAQ	2456.71	-34.87 (-1.40%)
CMT10Y	2.03	0.03 (1.50%)

Headlines

Elite Winners' from Metro Detroit's 101 Best and Brightest Announced Today  
09/29/11 2:00 PM - PR Newswire

U.S. Military Special Forces Buy Unique Satellite Receive Suite From Nashua-Based Windmill International, Inc.  
09/29/11 2:00 PM - PR Newswire

Fitch Withdraws JE Robert's CMBS Special Servicer Rating  
09/29/11 1:59 PM - Business Wire

Professional SportsCare & Rehab to Open at 1090 Vermont Avenue  
09/29/11 1:48 PM - PR Newswire

German Firm Solteure Granted U.S. Product Certification  
09/29/11 1:30 PM - Business Wire

VIEW ALL NEWS

Profile - Windows Internet Explorer  
http://test-preprod.myview.swst.com/e7d4d53a-bfac-4481-a12c-51f34df1921e/MyProfile/Accounts

**HilltopSecurities**  
A Hilltop Holdings Company.

PORTFOLIO QUICK VIEW   Notices   Profile   Log Out

PORTFOLIO   EDOCUMENTS   REPORTS   RESEARCH   TOOLS

## Profile

INFORMATION   USER PREFERENCES   SECURITY   **ACCOUNTS**

### Investor Accounts

Select the accounts you would like to see displayed in your Portfolio. You can add or remove accounts at anytime.

AVAILABLE ACCOUNTS **1**   **2**   REGISTERED ACCOUNTS **3**

ADD >  
< REMOVE

Contact your advisor to add a bank or financial institution. The following forms are required:

- ACH Authorization Document (PDF)

### Profile Summary

**User Preferences**  
Username: [redacted]  
Email: [redacted]  
Language: English

**Security Settings**  
Password: Last updated 9/22/2011  
Questions: Last updated 9/22/2011

**Accounts in portfolio**  
Active: [redacted]  
Active: [redacted]  
Available: [redacted]  
Available: [redacted]

Done   Local intranet | Protected Mode: Off   120%

- Click on an account under the “Available Accounts” box (1) then click add (2). This will move the account to the “Registered Accounts” box (3).
- Once you have finished adding your account(s), click on the Portfolio tab to take you back to the Portfolio Snapshot page. You will now be able to view all registered accounts under one username.