

## Commonfund Client Reporting Portal

### Commonfund Single Sign On Help

Effective Tuesday, February 18, 2014, Commonfund has implemented a new, single sign-on login that provides enhanced security and flexibility in managing your login credentials.

Your username will be your email address, for example "jsmith@cfund.org".

**The system uses this username email address to send you your new password.**

**You will need access to the email account associated with this user name to retrieve these emails.**

If you don't have access to the associated email account, (for example: if you share a login with another person), then a new username login will need to be created by calling Account Services at 888-TCF-FUND (888-823-3863) or the owner of the email account will need to go through this process and provide the login credentials.

Whether you are a new Client Reporting Portal user transitioning from Portfolio Access or an existing SSG or Multi-Asset Program Portal user, **it will be necessary to reset your password the first time you log in to the new Client Reporting Portal. In this process you will need to establish answers to 5 security questions.**

These security questions are used each time a password is reset and are used to verify your identity.

Strong password requirements have been implemented to prevent people from "guessing" passwords. Strong passwords have a minimum length and must contain letters, numbers, and special characters.

The first time you log in to the new Client Reporting Portal it will take about 10 minutes to run through the process of selecting your security questions and resetting your password.

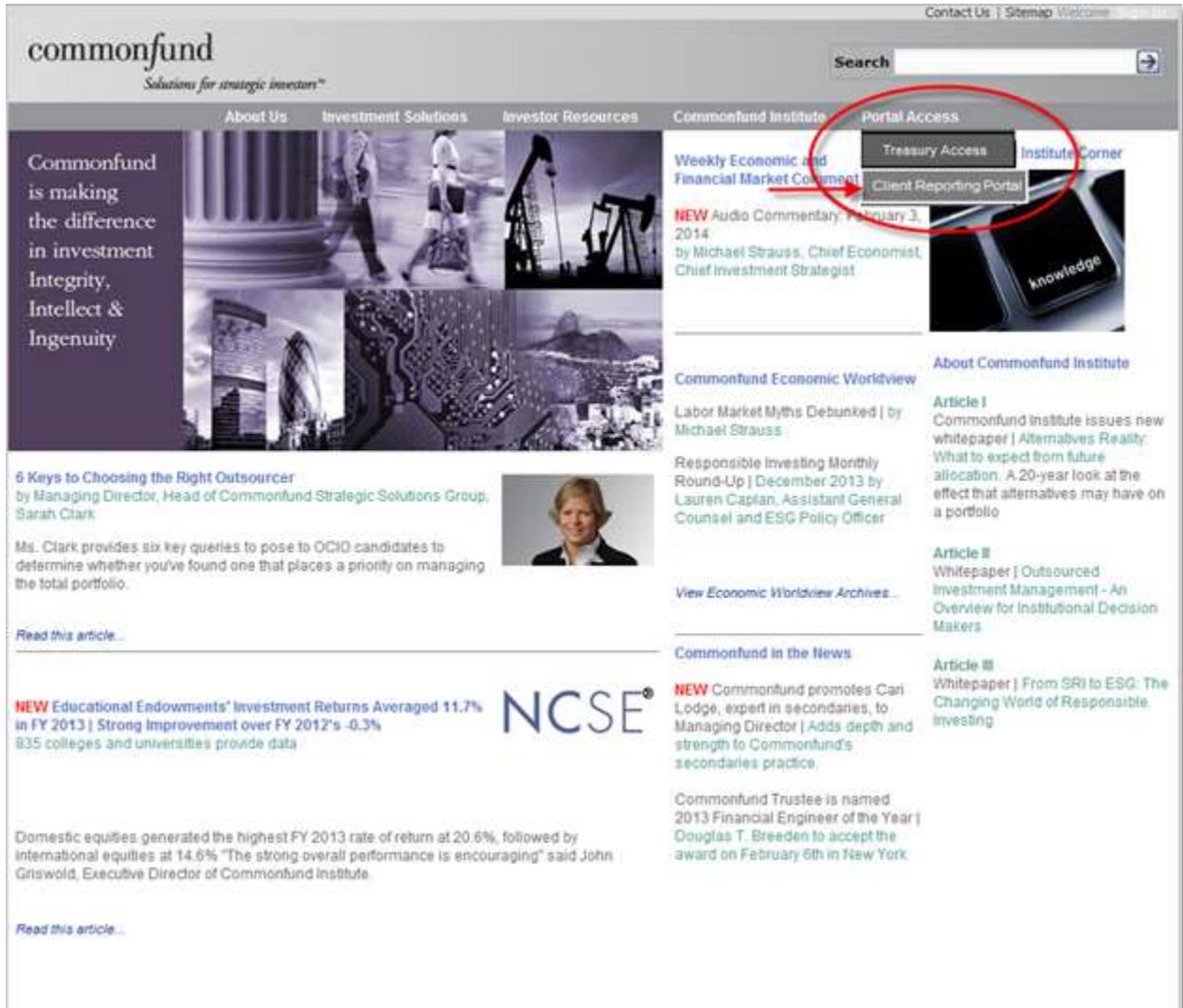
If at any time during this process you need assistance, please email us at [PortalHelp@cfund.org](mailto:PortalHelp@cfund.org) or call Account Services at 888-TCF-FUND (888-823-3863).

So let's get started...

Commonfund Client Reporting Portal

Step 1 | Access [www.Commonfund.org](http://www.Commonfund.org)

Access the [www.Commonfund.org](http://www.Commonfund.org) website and select the new “Client Reporting Portal” from the menu drop-down.



## Commonfund Client Reporting Portal

### Step 2 | Secure Access Login

Once the “Client Reporting Portal” has been selected, the below new Commonfund “Secure Access” login page will display.

At this point you have 2 options.

**Option 1.** If you are a current user of the Strategic Solutions Portal or the Multi-Asset Program Portal AND you remember your password you can jump ahead to [Step 4](#). However, if you fail 3 times your account will be locked and you will need to contact Account Services at 888-TCF-FUND (888-823-3863).

**Option 2.** If this is your first time, or you do not remember your password (Please note Portfolio Access passwords will not work in this system), then continue on to [Step 3](#).

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is making the difference in investment  
Integrity,  
Intellect &  
Ingenuity

**Welcome**  
Commonfund’s mission is to help institutional investors achieve their investment objectives and fulfill their long term goals. As one of North America’s prominent investment managers, we strive to deliver superior fund management, provide unsurpassed service and broaden and deepen the insight needed by investors to make informed decisions.

Existing clients please log-in below.

**SECURE ACCESS**

user name:  
password:

Remember me?

Login

[Request Access](#) [Reset Password](#)  
[Need help logging in?](#)

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**Important Information**  
By logging in and using the account information of this Website, you agree that Commonfund will have no liability for damages arising from any actions such as investment decisions, taken by or on behalf of your institution based on the accuracy of the account data presented in this website.

Commonfund will take reasonable precautions to ensure data provided to you on the account information of this Website is complete and accurate. However, due to the nature of information delivery technology and the necessity of using multiple data sources, Commonfund is not able to assure the accuracy of your account data before it is presented on the site.

The official record of Client investments resides in the core accounting systems of Commonfund and its subsidiaries.

If you encounter any difficulties during the login process or have any issues, comments, or questions, please contact Account Services at 888-TCF-FUND (888-823-3863) or email us by clicking [here](#).

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Commonfund Client Reporting Portal

Step 3 | Get a Temporary Password

A temporary password for the new Client Reporting Portal application will be required. After entering your User Name, click on the “Reset Password” link.

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Existing clients please log-in below.

**SECURE ACCESS**

user name:  
jsmith@cfund.org

password:

Remember me?

**Commonfund has changed the password policy**

The first time you login in you will be required to select new security questions and to change your current password to meet the new standards.

Thank you for your participation.

Login

[Request Access](#)   [Reset Password](#)

[Need help logging in?](#)

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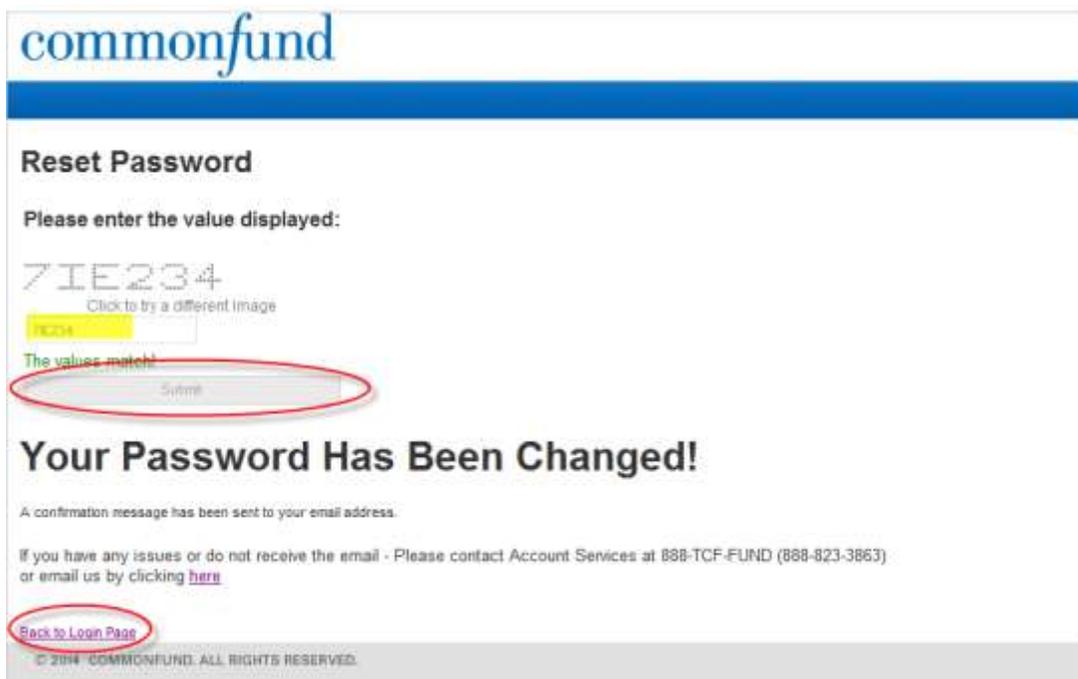
Commonfund Client Reporting Portal

Once you click the “Reset Password” link the following screen will appear.



Enter the string of characters that will be displayed and click the “Submit” button. The screen will confirm that the password has been changed. See the screen shot below.

Click on the “Back to Login Page” link.



A “temporary” password will immediately sent to your email. If you don’t see the email, please check your spam folder.

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The email received will have a new “system generated” password that you will allow you to continue by carefully writing down or “cut & pasting” the temporary password for the next step.

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Step 4 | Log-in Using Your Password

From the Commonfund “Secure Access” login page, using your new temporary password (or if you skipped ahead, the password you remember) please enter your user name and password and click the “Login” button. We recommend, for security purposes, that you do not check the “Remember me?” check box at this time.

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Existing clients please log-in below.

**SECURE ACCESS**

user name:  
jamith@cfund.org

password:  
\*\*\*\*\*

Remember me?

**Login**

[Request Access](#) [Reset Password](#)

[Need help logging in?](#)

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Step 5 | Select Your Security Questions

At this point 5 personal Security Questions will need to be selected.



## Security Questions

Before proceeding you will be required to select some security questions and provide answers to the selected questions. This will be used in the future to identify your account in case of the need to reset you password.

**a valid answer will meet the following criteria:**

- minimum 1 character in length

Selection 1 of 5

Question: -- Please select a security question -- Update

Answer:

Selection 2 of 5

Question: -- Please select a security question -- Update

Answer:

Selection 3 of 5

Question: -- Please select a security question -- Update

Answer:

Selection 4 of 5

Question: -- Please select a security question -- Update

Answer:

Selection 5 of 5

Question: -- Please select a security question -- Update

Answer:

Continue

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Once you have answered 5 questions, click "Continue".

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## Security Questions

Before proceeding you will be required to select some security questions and provide answers to the selected questions. This will be used in the future to identify your account in case of the need to reset you password.

**a valid answer will meet the following criteria:**

- minimum 1 character in length

Selection 1 of 5

Question: In what city did you meet your spouse / significant other?

Answer: .....

Selection 2 of 5

Question: In what city or town did your parents meet?

Answer: .....

Selection 3 of 5

Question: In what city or town was your first job?

Answer: .....

Selection 4 of 5

Question: What is the street number of the house you grew up in?

Answer: .....

Selection 5 of 5

Question: What was the last name of your third grade teacher?

Answer: .....

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Step 6 | Confirm Your Identity

In this step, 2 of your 5 previously created personal security questions will need to be answered.

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User Name:

## Answer Security Questions

Before proceeding you will be required to answer 2 of your security questions.

If you have any issues or have forgotten your answers. Please contact Account Services at 888-TCF-FUND (888-823-3863) or email us by clicking [here](#).

Question 1 of 2

Question:

Answer:

Question 2 of 2

Question:

Answer:

[Back to Home Page](#)

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Once the 2 security questions have been answered an email will be sent to allow the creation of a new strong password.

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User Name:

## Answer Security Questions

Before proceeding you will be required to answer 2 of your security questions.

If you have any issues or have forgotten your answers. Please contact Account Services at 888-TCF-FUND (888-823-3863) or email us by clicking [here](#).

Question 1 of 2

Question:

Answer:  correct

Question 2 of 2

Question:

Answer:  correct

**A temporary link has been sent to your email address (expires in 24 hours) open the email and click on the link to complete your password reset.**

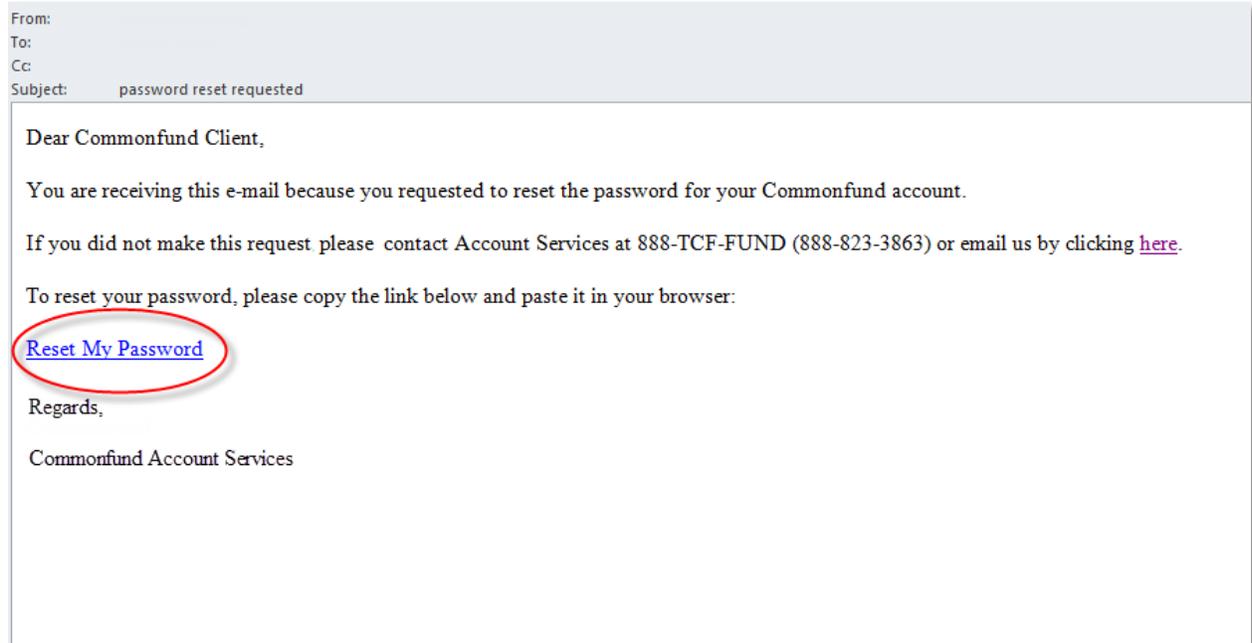
[Back to Home Page](#)

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## Commonfund Client Reporting Portal

### Step 7 | Access the “Password Reset” Email Link

Check your email inbox and you should have received a “Password Reset Requested” email. Open the email and click on the Reset My Password link.



## Commonfund Client Reporting Portal

### Step 8 | Choose Your New Password

Almost done! A new “strong” password needs to be created. This new password must meet the following criteria.

- Minimum 8 characters in length
- Minimum 1 digit(s) (0-9)
- Minimum 1 lowercase character(s)
- Minimum 1 uppercase character(s)
- Minimum of 1 special character(s) (“!@#%&\_”)

As shown below the screen will tell you when a suitable password has created. (You will not be able to continue until a “strong password” has been established.)

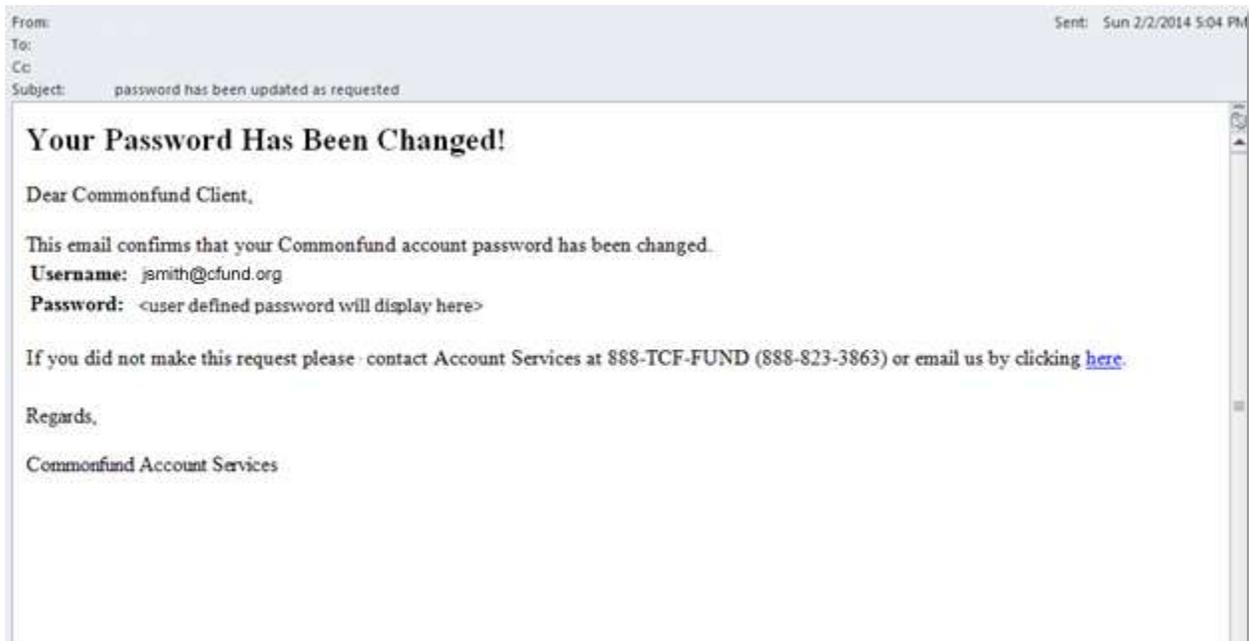
Once you are set, click “Update”.

The screenshot displays the 'Reset Password' interface. At the top, the 'commonfund' logo is visible. Below it, a blue header bar contains the text 'User Name: jsmith@cfund.org'. The main heading is 'Reset Password'. Underneath, a message states: 'a valid password will meet the following minimum standards:'. A bulleted list details the requirements: minimum 8 characters in length, minimum 1 digit(s) (0-9), minimum 1 lowercase character(s), minimum 1 uppercase character(s), and minimum 1 special character(s) (!@#\$%^&\_'). The 'New Password' field is filled with asterisks and has a green progress bar to its right labeled 'Very Strong'. The 'Confirm' field is also filled with asterisks and has the text 'passwords match!' to its right. The 'Update' button is highlighted with a red oval.

## Commonfund Client Reporting Portal

### Step 9 | Confirmation of Your New Password

The system will generate a confirmation to your email address with your newly created password.



Congratulations! You have set your security questions and created your new strong password.

If you have any problems or questions please email us at [PortalHelp@cfund.org](mailto:PortalHelp@cfund.org) or call Account Services at 888-TCF-FUND (888-823-3863).