

Davenport Online – New Modern Theme

What is the Modern Theme?

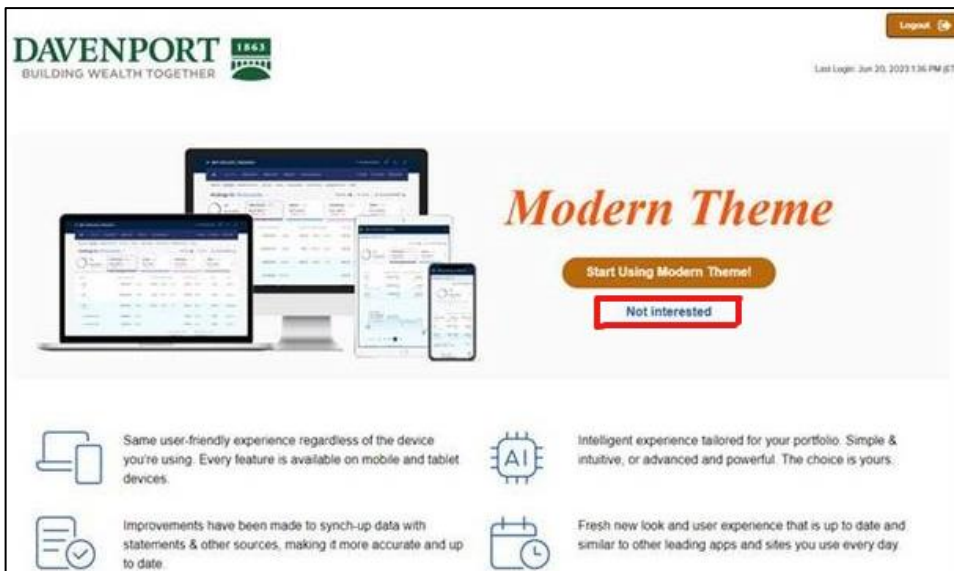
The Modern Theme is a new display option offered for Davenport Online. Davenport Online currently has three theme options: Modern, Standard, and Accessible. All themes will provide the same account information to you, but the information will be displayed differently. Your theme can be changed at any time by going to your account settings.

Modern Theme Prompt

When you log in to Davenport Online, you may receive a prompt to start using Modern Theme. If you'd like to switch to the Modern Theme, click the orange **Start Using Modern Theme** button.



If you'd like to continue using your current theme (either the Standard or Accessible Theme), click **Not Interested**.

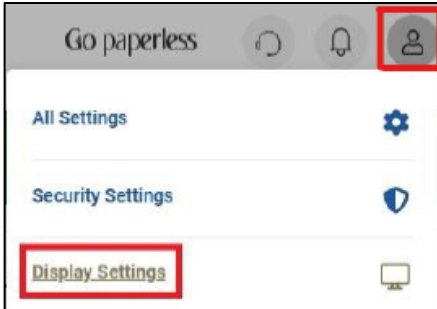


Changing Your Theme from Modern to Standard or Accessible

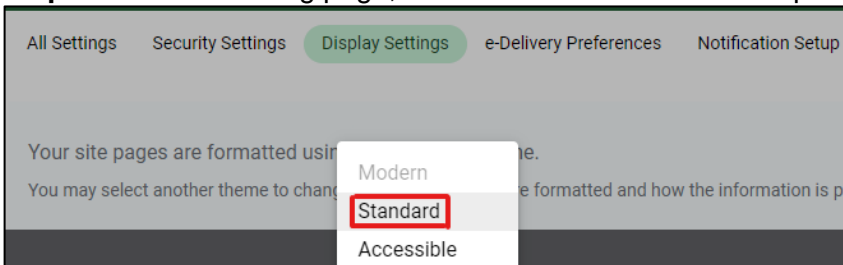
If you have switched to Modern Theme and would like to change back to Standard or Accessible, take the following steps.

Modern Theme to Standard Theme

Step 1: Click the person icon in the top right corner of Davenport Online. Choose *Display Settings* from the menu.

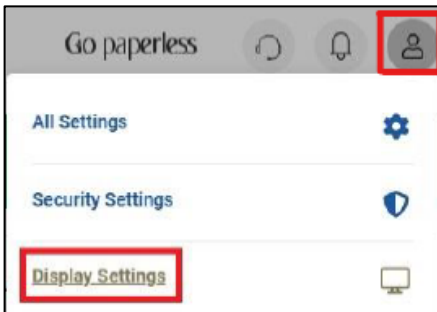


Step 2: On the resulting page, choose *Standard* from the dropdown.

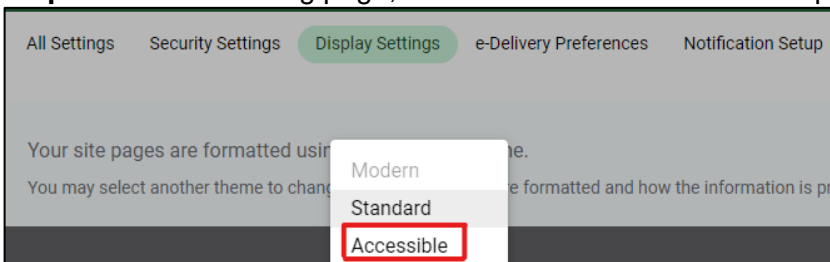


Modern Theme to Accessible Theme

Step 1: Click the person icon in the top right corner of Davenport Online. Choose *Display Settings* from the menu.



Step 2: On the resulting page, choose *Accessible* from the dropdown.



Changing Your Theme to Modern Theme

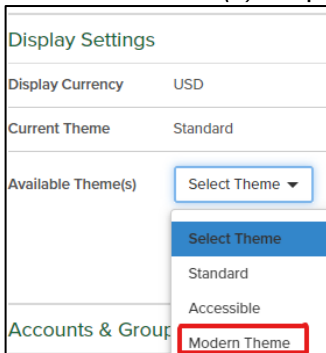
If you are not currently using the Modern Theme but would like to, take the following steps to switch to the Modern Theme.

Standard Theme to Modern Theme

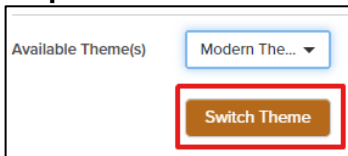
Step 1: Click the gear icon near the top right corner of Davenport Online.



Step 2: On the left side of the screen, find *Display Settings* and choose Modern Theme from the *Available Theme(s)* dropdown.

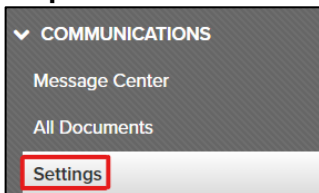


Step 3: Click the *Switch Theme* button to confirm the change.

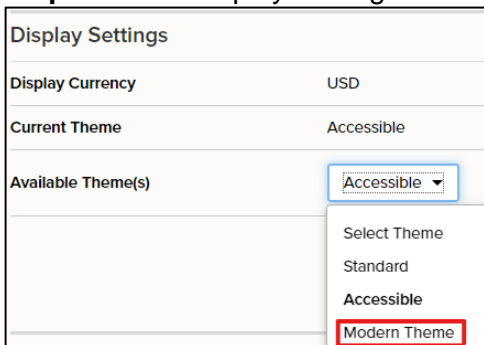


Accessible Theme to Modern Theme

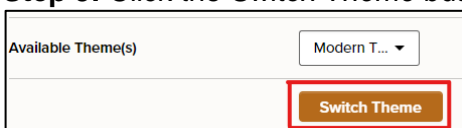
Step 1: On the left side of the screen, expand the Communications menu to choose Settings.



Step 2: In the Display Settings section, select Modern Theme from the Available Themes dropdown.



Step 3: Click the *Switch Theme* button to confirm the change.



Additional Information

Additional navigation information for the Modern Theme is below.

Account Overview

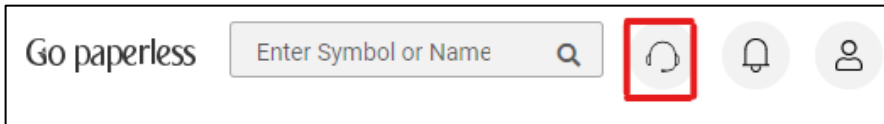
The account overview on the home page is located on the right side of the screen and will show all the accounts you have access to in a list view. Click on the blue account nickname to access more information such as balances, history, and holdings.

Investments	Market Value
IRA	\$0.00
x0000	\$0.00 0%

[View Account Balances](#)

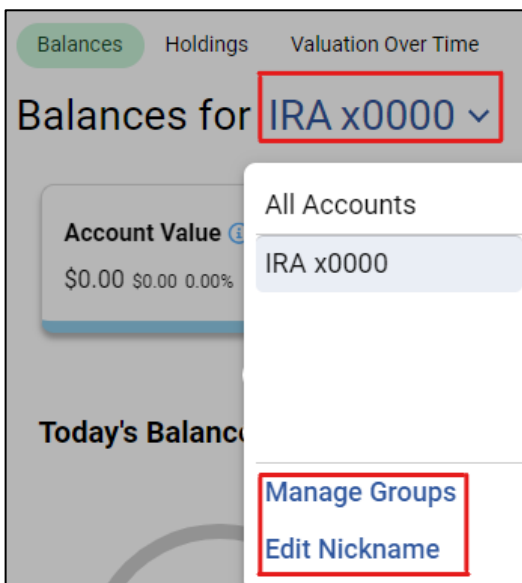
Advisor Contact Information

Your advisor's contact information is available in the top right corner under the headset icon.



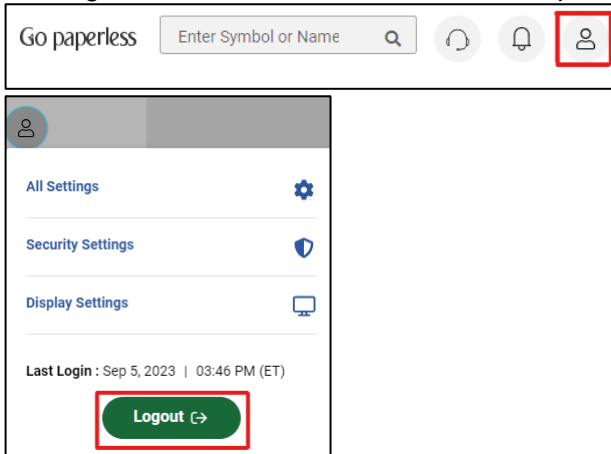
Creating Account Groups or Nicknames

If you'd like to update your account nickname or create a group, click the individual account drop down. To create a group, select *Manage Groups*. To edit an account nickname, select *Edit Nickname*.



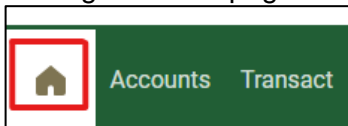
Logout

The log out button can be found under the person icon in the top right corner.

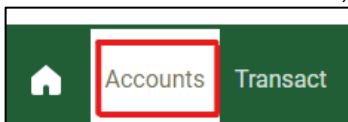


Navigation

The navigation bar within Modern Theme has a home button which will return you to the main landing/overview page that displays upon first logging in to your account.

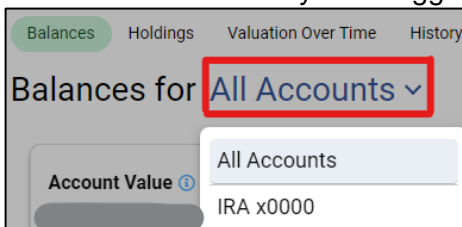


To view account balances, holdings, and history, click on the *Accounts* button on the navigation bar.



Switching Between Accounts

If you would like to view a specific account, you can do so by clicking the *All Accounts* drop down button which will allow you to toggle between accounts.



Support

Davenport Online Support is available Monday through Thursday, 8:45 a.m. to 5:00 p.m. EST and Friday, 8:45 a.m. to 4:15 p.m. EST. We may be reached by email at support@investdavenport.com. You may also reach us by telephone at (804) 697-2997 or toll free at 1 (888) 742-1863.

Important Note to Recipients: *The information presented herein was compiled from sources believed to be reliable. It is intended for illustrative purposes only and is furnished without guarantee of its completeness or accuracy. This illustration is for informational purposes only and is not intended to provide specific financial planning or investment advice. Individual circumstances may vary.*