INVESTOR PORTAL TWO-FACTOR AUTHENTICATION



TWO-FACTOR AUTHENTICATION INTRODUCTION

Soon the underlying platform for the SPI Investor Portal will *require* you to use **Two-Factor Authentication** to secure your account. To begin using this feature ahead of the upcoming requirement, you may enable **Two-Factor Authentication** now.

Follow the steps in this short guide to enable **Two-Factor Authentication** and ensure that your information and data are kept secure.

As always, should you need any additional help enabling Two-Factor Authentication, don't hesitate to reach out to us at **<u>Support@SPIAdvisory.com</u>**.

STEP 1: LOGIN & OPEN USER SETTINGS

Log into your <u>SPI Investor Portal</u>, then **SINGLE-CLICK** on your name in the *upper right corner* of the screen.

Then, select **"User Settings."** This will take you to a new page on the Investor Portal.

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janedoe@spiadvisory.com Logged in SPI Advisory
User Settings

STEP 2: OPEN AUTHENTICATION SETTINGS

After clicking **"User Settings,"** the **Change Password** tab will open. Click on the tab to the right called **Authentication Settings**.



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STEP 3: SELECT TWO-FACTOR AUTHENTICATION

The **Authentication Settings** tab has a dropdown field called **"Enabled setting."** Click into the field and select **Two-factor authentication**.

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Enabled setting	Inherit 🔹
	None
	Inherit
	Endpoint detection
	Two-factor authentication
Source name	

NOTE: Once you change this setting to **Two-factor authentication**, it **CANNOT** be changed back. Notice that all other values are greyed out.

STEP 4: ENROLL A TWO-FACTOR AUTHENTICATION SOURCE

Below the **Authentication sources** panel, a new button is shown in the *bottom right corner*. Click the **Enroll authentication source** button, then open the following webpage and complete the steps indicated here: <u>Two-Factor Authentication Instructions</u>.

	Authentication sources		
Source name		Primary	Delete
uthenticator App			Ê