

## ACCESSING CLIENT WEB RESOURCES ON KAUFMANHALL.COM

Along with the information and resources publicly available on the Kaufman Hall corporate website, authorized clients can access additional resources upon logging into the site.

These resources include:

- Secure File Exchange for clients who are uploading or downloading files
- The Financial Advisor Portal (FA Portal) for clients who have subscribed to use our web-based tools for Bond and Swap Management

## ACCESSING SECURE FILE EXCHANGE AND FA PORTAL

1. Launch your web browser (e.g., Chrome, Edge, Firefox)  
You may need to change browser settings to enable cookies and allow pop-ups
2. Navigate to [www.kaufmanhall.com](http://www.kaufmanhall.com)
3. Scroll down to the footer section at the bottom of the website.
4. Click on the link of the resource you wish to access, as depicted in the screen shot below.



5. You will be navigated to the login screen within a new browser window.  
If you are already a registered user with our new accounts system, input your email address and password then click “Login”. You will be immediately redirected to the home page of the resource you selected.

If you don’t recall your username and password, click the “Forgot password?” link to initiate a password reset.

If you require a new registration, click “Register” to continue with the registration process.



6. Fill out the new user registration form using your corporate information (personal emails are not allowed) and select "Register".

Please note: if the registration returns "There is already an account associated with this email address. Please login instead", please login using your credentials or click the "Forgot password" function to reset your password.

**KaufmanHall**

## Register New User

**NOTE:** Registrations for group mailboxes will be denied. You must register as an individual user for your account to be considered for approval.

**First Name** \*

**Last Name** \*

**Email Address** \*

**Password** \* [Password Requirements](#)

- Must be at least eight characters in length
- Must contain one or more characters from each of the following four categories:
  - Uppercase characters (A through Z)
  - Lowercase characters (a through z)
  - Numbers (0 through 9)
  - Special characters !@#\$%^

**Confirm password** \*

**Title** \*

**Address** \*

City  - State -  Zipcode

**Phone** \*

**Organization** \*

**Subscribe to Software Product notification emails.**

\* Denotes Required Field

Already have an account? [Sign In](#)

Note that the password rules are as follows:

- Must be at least eight characters in length
- Must contain one or more characters from each of the following four categories:
  - Uppercase characters (A through Z)
  - Lowercase characters (a through z)
  - Numbers (0 through 9)
  - Special characters !@#\$%^

7. Once the information has been verified by Kaufman Hall, you will be granted access to the appropriate web resources. Please allow up to one business day for the registration to be reviewed and processed.

If you require additional assistance, please contact the Support Administrator at [support@kaufmanhall.com](mailto:support@kaufmanhall.com) or 847.441.8780.