Online Portal Registration

1. You will receive an email with the subject line: **Register to your online portal with OceanFront Investment Counsel Inc.**
2. The email will have 2 steps for you to complete by using your respective links as they appear in the screenshot example below:
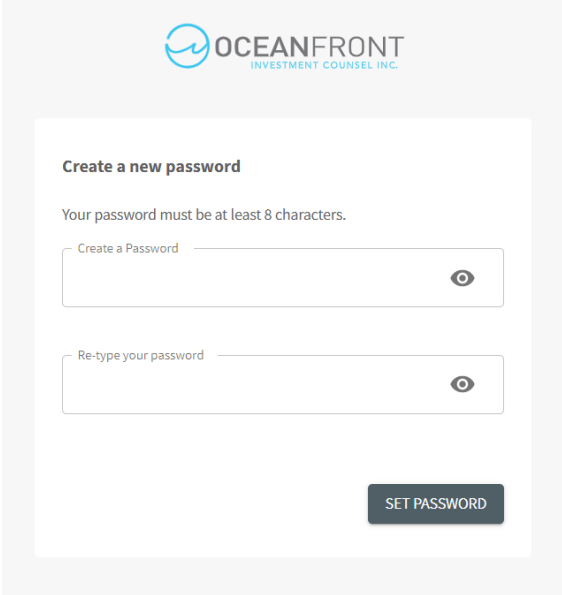
Note: If your computer has the following warning, **please click the box "I understand this site may be harmful if I proceed"** and then click on the button to proceed.
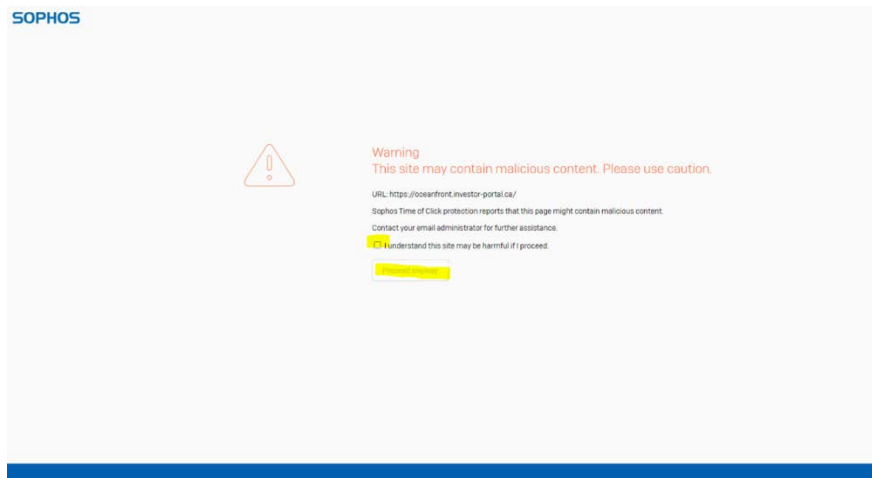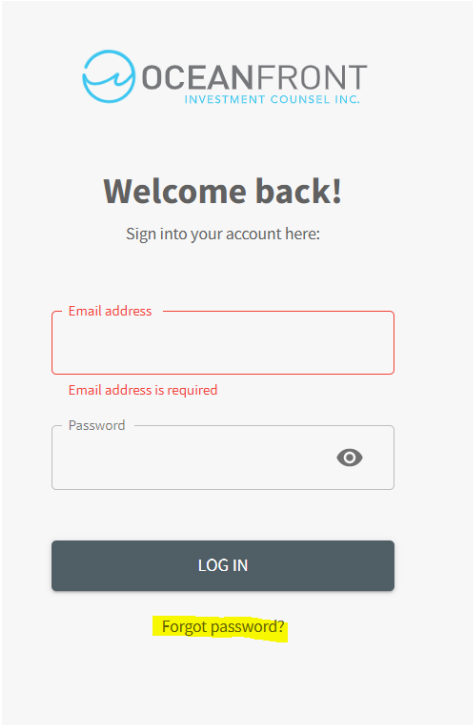

This is due to computer security settings on the users end. You can verify it is a secure link by looking for the "https" at the start of the URL at the top right.

Step 1: Register your account and set up a password. The link will bring you to a page that looks like the screenshot below:

Step 2: Once your user credentials are set up, you can use the second link to access the sign in page. If you have forgotten your password, there is a forgot password function highlighted below on this page.
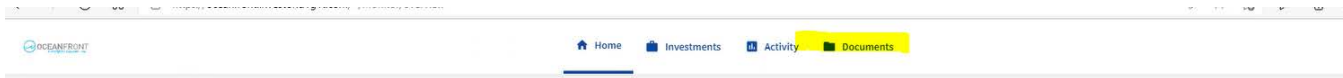

Note: We recommend bookmarking the above sign in page in your web browser for future use.

Accessing Your Account Documents

1. When you initially sign into your portal, you will be brought to the home page with all your account information.
2. To access your documents, use the navigation along the top of the webpage and click on **"Documents"**.

3. From here, you will have access to the following documents:
   a. Monthly statements.
   b. Quarterly Reports.
   c. Tax Documents.
4. All documents are organized by the date the documents were uploaded. To date, any tax related documents will show up in the January, February & March 2022 folders.
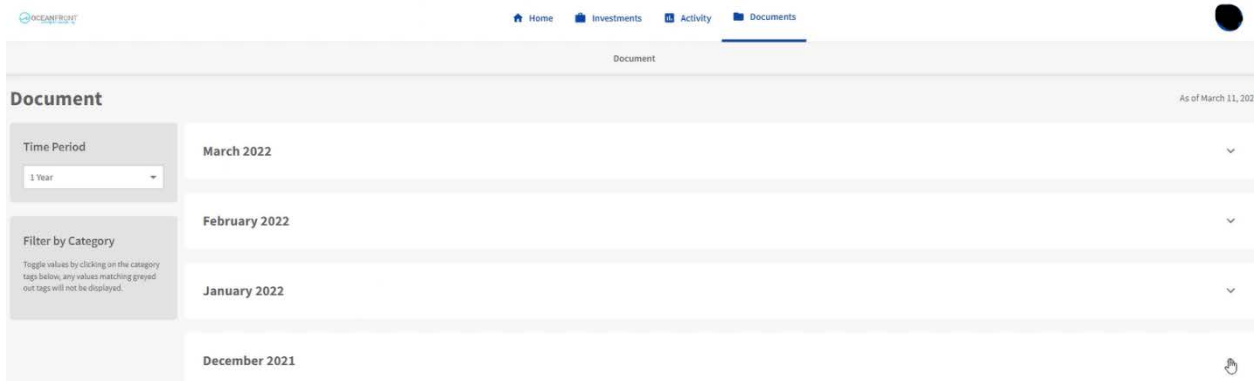
5. You can expand each monthly folder by clicking on the folder itself.
6. Once you have found the documents you are trying to retrieve, you can download the PDF to your computer by **clicking the download button on the right side**.