



OneView Client Website Login Instructions

Here are the Client login instructions for the Oneview Client website. This site is for both brokerage and non-brokerage business.

Enter this web address into your web browser to log in:

<https://oneview.v2020-sai.com>



Once the login screen appears, enter your User ID and click **Continue**. Then type in your password and click **Login**.

If you forgot your password, click on the **Forgot Password** link and follow the prompts to reset your password.

If you forgot your User Name, click on the **Forgot User Name** link and follow the prompts to recover your User Name.

OneView Client Website Registration Instructions (FOR FIRST-TIME USERS)

Please request initial access to OneView by contacting your advisor or calling the office (the **Register Now >>** link pictured above no longer works). You will then be sent an email with instructions to register for a OneView Account:

Step 1

View the Investor View online access registration email

***Access code is valid for 24 hours

Step 2

Click on URL located in the email

***Remember the Access Code

Step 3

Complete the four steps of the registration process

- SSN & Access Code
- User Agreement
- Personal Info
- Review and Submit



VISION²⁰²⁰
ONEVIEW

SSN & Access Code User Agreement Personal Info Review and Submit

1 2 3 4

Please enter your Social Security Number and Access Code:

Social Security Number : (ie. 111223333)

Access Code :

User Name requirements

- Must be between 6 and 20 characters
- May NOT contain the last four digits of your SSN/TIN
- Must be different than previous username

Password requirements

- Must contain a minimum of 6 characters
- Must contain at least one numeric and one alphabetic character
- Must be different from your User Name
- Must be different from your previous 5 passwords
- May not be the same as the access code

If you have any questions or need any assistance, please do not hesitate to give our office a call!