



How to Manage Your Account Online

Whether you have been using harborfunds.com account management features for a while to manage your account, or if you're just getting started, this guide will help you find and use the key features in our newly redesigned website.


Logging In

First, you must get access to the system and log in. If you visit harborfunds.com, you'll see a Login button in the upper right corner of every screen. Click Login and you'll see the main login screen shown below.

- ① If you have **already established your user ID and password**, go ahead and enter your User ID and click "Login"
- ② **If you have never setup your Harbor accounts online**, click "register your account for online access". This will allow you to identify yourself and your account, and establish a user ID, password and some security details.
- ③ **If you have an old harborfunds.com user ID, but have not set up a new password and security profile yet**, you should click "setup a new password". You will enter your existing User ID, provide some information like your Social Security Number and Account Number, and then establish a new password and security details.

Click here to learn more: [How To Set Up Your Password and Security Profile.](#)

Contact Us

 Harbor Funds

Your Harbor Funds Portfolio

Account Login

In order to access your personal Harbor Funds account, please enter your User ID and click Login.

User ID: ①

Do you need help? ②

- Did you forget your User ID?
- If you've never been online with Harbor before, please [register your account for online access](#).
- Has it been a while since you've visited? You may need to [setup a new password](#).

Do you want instructions? ③

- [How to Manage Your Account Online](#) - The basics of how to use harborfunds.com to view account details, change account settings and execute trades.
- [How to Setup Your New Password](#) - For longtime user of HarborFunds.com who haven't been back for a while.

Ready to Open an Account?
If you're ready to start investing for the future, you can open a new Harbor Funds account online, in just a few minutes.

How Is Everything Organized?

We designed the new system around two main pages:

Portfolio Summary—From this basic starting point, you can see a summary of all of your accounts and funds. The [Accounts Tab](#) ① shows your high-level account data. You can use the [View Statements & History](#) ② tab to access statements, view pending trades, see historical transactions and balances, etc. And the [My Account Profile](#) ③ tab allows you to easily manage your user ID, password, mailing address, e-mail address and e-delivery settings.

If you click any Fund name ④ in the Portfolio Summary table, you'll see a detailed Account View, and be able to work directly with that specific account.

Log Out | Contact Us

Harbor FundsSM

Portfolio Summary

Your Harbor Funds Portfolio

① Accounts ② View Statements & History ③ My Account Profile

Portfolio Summary

Portfolio Total Value: \$18,214.50

Open a New Account

Click a Fund Name below to see your personal accountfund details.
To learn more about how to use this system, read our brief, visual guide: [How to Manage Your Account Online](#).

Account Number and Funds	Ticker	Shares	Price	As of Date	Market Value	Trades
1234-4567 JOSEPH INVESTOR						
HARBOR LARGE CAP VALUE - INVESTOR	HIVLX	1,000.000	\$7.29	11/22/2010	\$7,290.00	Buy Sell Exchange
HARBOR INTERNATIONAL - INSTITUTIONAL	HAICX	150.00	\$59.28	11/22/2010	\$8,892.00	Buy Sell Exchange
Account Total				11/22/2010	\$16,182.00	
3243-6657						
HARBOR MID CAP GROWTH - INVESTOR	HAMGX	250.000	\$8.13	11/22/2010	\$2,032.50	Buy Sell Exchange
Account Total				11/22/2010	\$2,032.50	
Portfolio Total					\$18,214.50	

Open A New Account from the Portfolio Summary screen, at any time.

One-click access to Buy, Sell or Exchange shares from the Portfolio Summary.

Functions Available in the Main Tabs:

Accounts ①

- Portfolio Summary view of all accounts

View Statements & History ②

- View Account Statements
- View and Cancel Pending Trades
- View All Account History
- View Historical Account Balances
- View All Tax Statements

My Account Profile ③

- Change User ID
- Change Password
- Change Security Profile
- Change Your Contact Info
- Add/Change E-mail Address
- Change Paperless E-Delivery Settings

Account View—Click any fund in your Portfolio Summary to see all the details for that fund and account. From the account view, the convenient [I'd Like To](#) list ① is how you *do* things: buy, sell or exchange, change distribution options, add or change banking information, etc.

Using the account view options ② across the top of the page, you can *view* the account details in numerous ways: account history, past balances, pending trades, average cost, beneficiary details, etc.

Links along the top of each page allow one-click access back to the current Account View or to the Portfolio Summary

Add a Fund to this Account, and both funds will conveniently appear together on one account statement.

When you're finished working with this account, one click takes you back to the Portfolio Summary view.

Log Out | Contact Us

Harbor Funds™

Portfolio Summary > Harbor Large Cap Value Fund—Investor Class

Your Harbor Funds Portfolio

Accounts | View Statements & History | My Account Profile

② Harbor Large Cap Value Fund—Investor Class Account Number: 1234-5678

Account History | Historical Account Balance | Pending Trades | Average Cost | Transfer-on-Death Beneficiary | Last Dividend | Tax Summary

Registered to: JOSEPH INVESTOR
101 SHAREHOLDER LANE
CHICAGO, IL 60606

① I'd Like To...

Fund	Shares	Price 11/22/2010	Available Balance	Trades
HARBOR LARGE CAP VALUE - INVESTOR	1000.000	\$5.94	\$5,940.00	Buy Sell Exchange

[Add a Fund to this Account](#)

[Return to Portfolio Summary](#)

Foreign Taxes Paid: This fund has paid taxes to foreign countries based on its foreign holdings. You may be required to complete IRS Form 1116 to report those taxes paid on your behalf as a shareholder. For more information on the foreign taxes paid, [click here](#).

- Buy shares in this fund
- Sell shares in this fund
- Exchange shares from this fund
- Setup Automatic Investment Plan
- Setup Automatic Redemption Plan
- Setup Automatic Exchange Plan
- Cancel Pending Trades
- Change Distribution Options
- Add a Fund to this account
- Add Bank Information
- Update Bank Information
- Reorder a Checkbook

Functions Available from the Account View

I'd Like To... ①

- Buy Shares
- Sell Shares
- Exchange Shares
- Setup Automatic Purchase, Redemption or Exchange Plans
- Cancel Pending Trades
- Change Distribution Options
- Add a Fund to This Account
- Add/Edit Banking Information
- Reorder Checkbooks

Account View Options ②

- Account/Fund History
- Historical Balance
- Pending Trades for this Fund
- Average Cost for this Fund
- View Beneficiary
- View Last Dividend
- View Year-End Tax Summary

Working With Your Accounts: Viewing and Doing

As you may have noticed from the descriptions above, there are two types of actions you can take within the Account Management system: you can *view* things and you can *do* things.

Viewing generally involves a single screen displaying fund or account data, like the Portfolio Summary table, or perhaps lists of statements or tax documents. When you're finished viewing, you can choose a new view from the menus, use the Return to Portfolio View button, or simply use the Back button on your browser.

Doing involves completing a series of steps in order, providing information or making choices along the way, until you're finished.

Log Out | Contact Us

Harbor Funds

Portfolio Summary > Harbor Large Cap Value Fund—Investor Class

Your Harbor Funds Portfolio

Accounts | View Statements & History | My Account Profile

Harbor Large Cap Value Fund—Investor Class Account Number: 1234-5678

Account History | Historical Account Balance | Pending Trades | Average Cost | Transfer-on-Death Beneficiary | Last Dividend | Tax Summary

Buy Shares

Step 1 of 3: How Much To Invest

How much you would like to invest?

Transfer From

BANK OF AMERICA
CHECKING ACCT #: *****3456
ELLERTON, FL 54675

Step 2 of 3: Where To Invest It

Invest in this fund.
 Invest in a new fund/account.

Select the desired fund:

HARBOR CAPITAL APPRECIATION FUND
HARBOR MID CAP GROWTH FUND
HARBOR SMALL CAP GROWTH FUND

The name of the fund you're working with is always displayed, as is the name of the process you're completing.

Steps are always called out to indicate the progress you're making.

Green buttons, like Continue or Submit, indicate how to move forward in a process.

Grey buttons like Cancel let you stop what you're doing. And orange buttons let you go in a different direction, or go back.