Welcome to PSN Manager Neighborhood U.S.

PSN Manager Neighborhood U.S. is the data entry portal for the PSN Database. PSN Manager Neighborhood

U.S. was created just for you. It's where you can:

- *Update your firm and product information*
- *Add new products, vehicles,or funds*
- *Submit historical and current returns*
- *Correct data contact information*

Getting Started

- *After requesting membership through the New Manager Registration form, a PSN Data Analyst will review your firm's application.*
- *They will confirm your firm's registration status with the SEC or similar governing body. They will also check if your firm had previously participated in PSN.*
- *Upon acceptance, the PSN Data Analyst will set up your firm in the PSN Database and create a login for you and your firm's Institutional Marketing contact.*
- *For security purposes, you will receive an automatic email with a link and directions to reset your PSN Manager Neighborhood U.S. password.*

Entering Data the First Time

- *Go to psn.fi.informais.com*
- *In the "Take me to" drop down, choose Manager Neighborhood U.S.*
- *Enter your login and password. If you do not have a password or would like to reset your password, click "Forgot Password" and login instructions will be emailed to you.*

- *After logging in, and accepting User Agreement, you will be directed to your PSN Manager Neighborhood home page. You will see your firm listed and a link to "Create a Product".*
- *Before entering any data, you should familiarize yourself with PSN Manager Neighborhood U.S. Click on Instructions and Welcome to the Neighborhood which will describe the home page and several functions.*
- *Under the Instructions tab, you will notice detailed Instructions on how to enter Firm Information as well as different Product information.*
- *After reviewing instructions, finish entering information about your firm and create your product listings. When complete, place a Mark next to the product and/or firm to notify PSN that you are ready for PSN to publish your information.*
- *A PSN Data Analyst will review the data. If entries are good, the information will be published the next business day. If information is not good or not complete, your entry will not be published. A PSN Data Analyst will place your firm/product in STOPPED status and will contact you. When entries are corrected, information will be published.*

Entering Data – Ongoing

- *PSN Release Schedule - Your updated information is transferred to clients on a daily basis. However, there are some clients that receive data at specific time periods during the month/quarter. For that reason, it is important to note the dates listed in the PSN Release Schedule tab. You will also receive email reminders during the quarter to update your data.*
- *There are several uploads available to update returns and other information on the home page. There is a holdings upload and import on the Holdings tab.*

Entered Data but NOT Ready to Publish

- *You may have entered some data but need to review.*
- *You may have entered some data but would still like to review. In that case, place a check Mark next to the product (or firm) that you are not ready to publish*
- *Click on Do Not Publish Check Marked*
- *All the Marked products will be hold until you decide to publish*

This is an exclusive neighborhood. Since this information will be distributed to over 5000 PSN data users, access to change your PSN information must be secure and limited. Only the registered PSN Data Contact (you) and the Institutional Marketing Contact at your firm has access to modify your PSN information. Should you need further assistance, please send an email to psndata@informa.com. PSN is an investment manager database accepting information on separate account composites, managed accounts, commingled funds, CITs and other investments. Since 1984, we have been supplying investment information to consultants, brokers, investment managers, plan sponsors and other vendors. Thank you for registering your information with the PSN database. We look forward to helping you market your firm and products for many years to come.