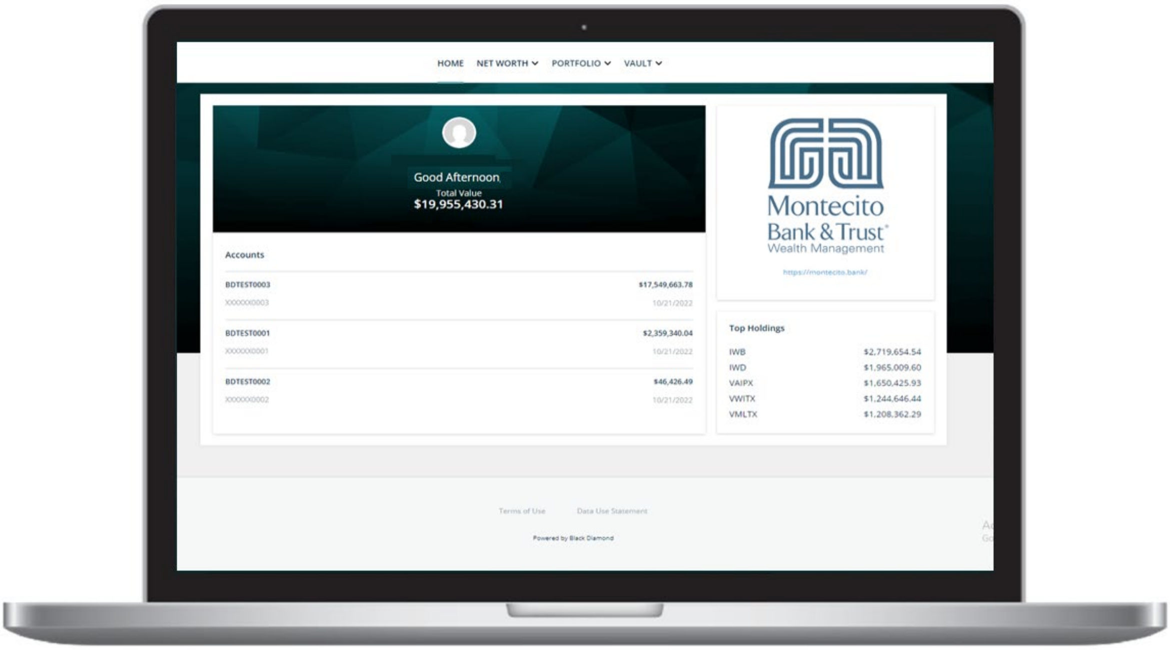
Welcome

Welcome to the MB&T Wealth Management platform guide. The platform grants you access to unique information and insights, account details, your investment dashboard, a document vault, instant access from any of your devices and more. This guide provides simple instructions to help you navigate the platform quickly and easily.



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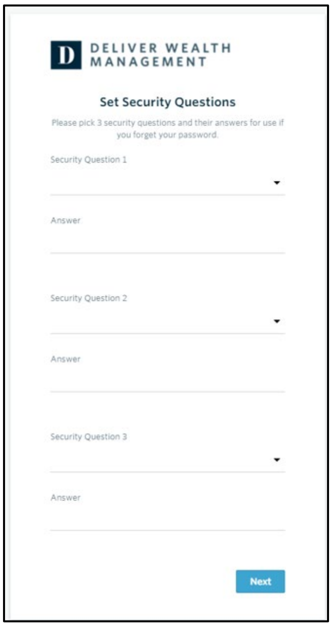
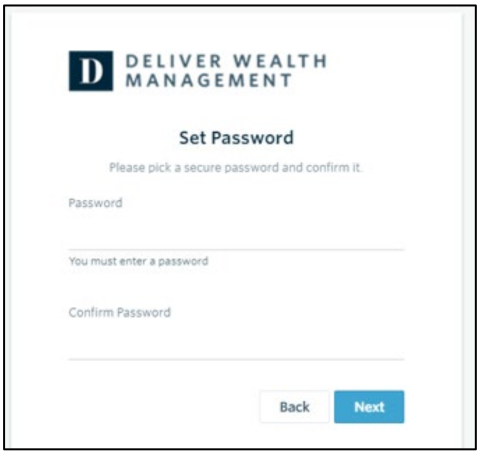
Wealth Management Platform

First Time Login

Note: You will receive a registration email from **noreply@bdreporting.com** with a link to set up your account. The link will expire in 7 days. If you have not received a registration email, contact your advisor.

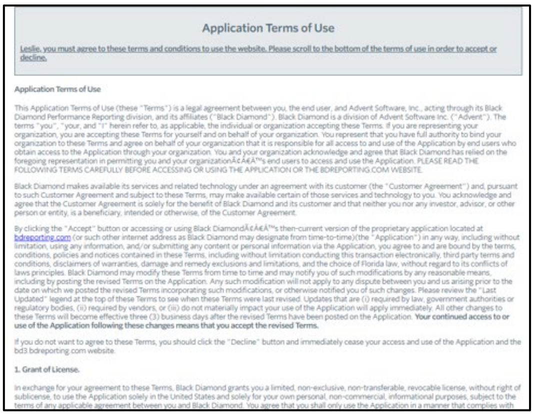
Click on the link or copy and paste the link from the New User Setup email.

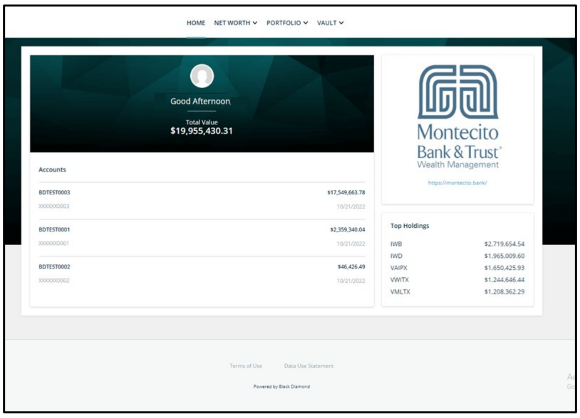




1. Select a security question and answer all three **Security Questions**.

2. **Enter** and **confirm** a chosen password. The password must contain at least 8 characters, 1 upper case letter, and 1 number.



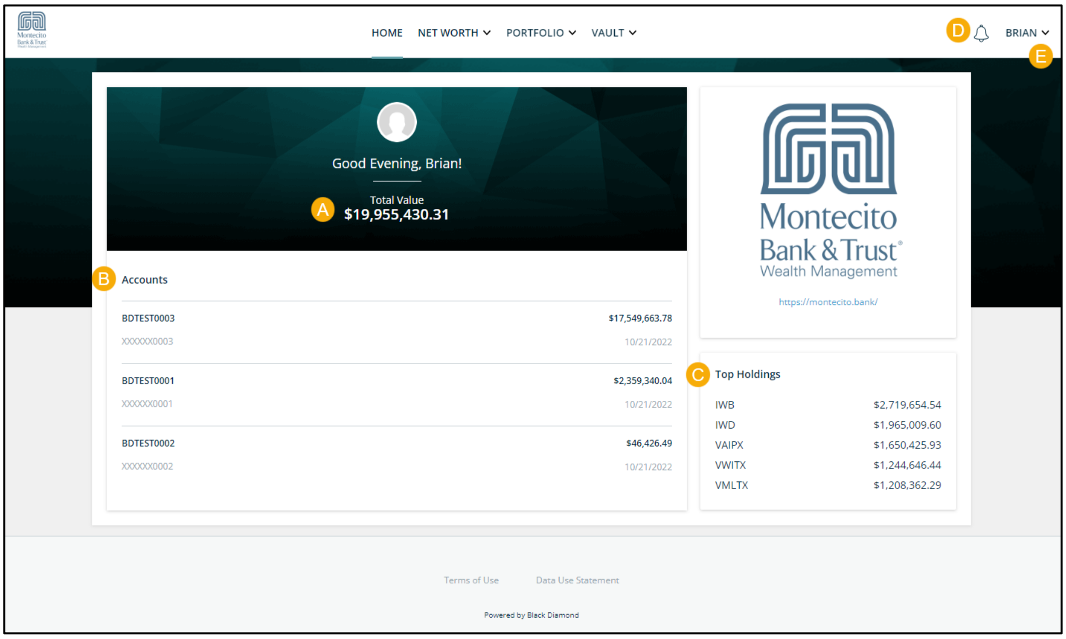


3. **Read** and **accept** the Application Terms of Use.

4. After accepting, you will be redirected to the client platform.

Home Page

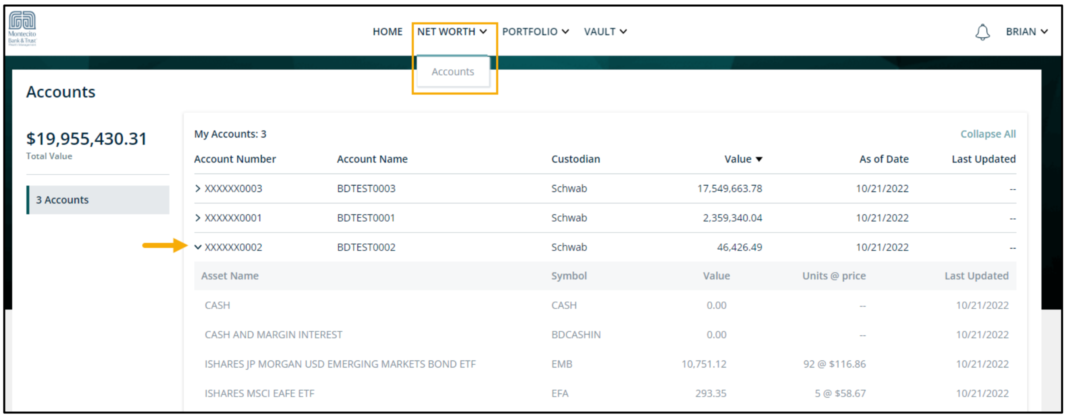
Your personalized home page has quick access to other pages of the platform. Your total portfolio value, accounts, and top holdings are displayed to provide you with pertinent information about your wealth relationship.



A. **Total Value** – Total value of your portfolio
B. **Accounts** –Your account balances
C. **Top Holdings** – Your Top Holdings
D. **Notifications** – View notifications from your advisor
E. **Profile** – Change your preferences or sign out of the platform

Net Worth

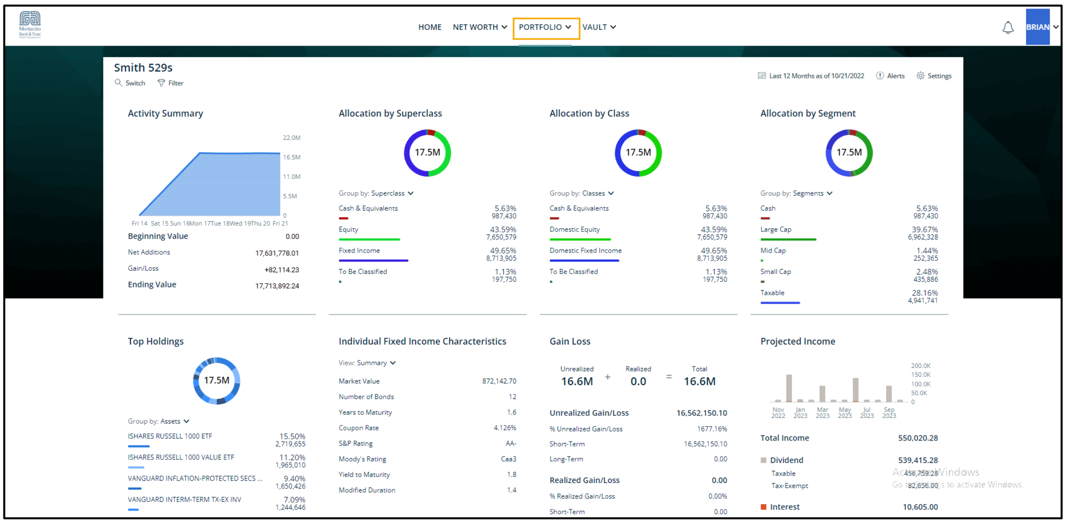
Net Worth displays the **My Accounts** page which provides a detailed list of balances and the status of your accounts. Expand each account to see your holdings and their values.



Portfolio

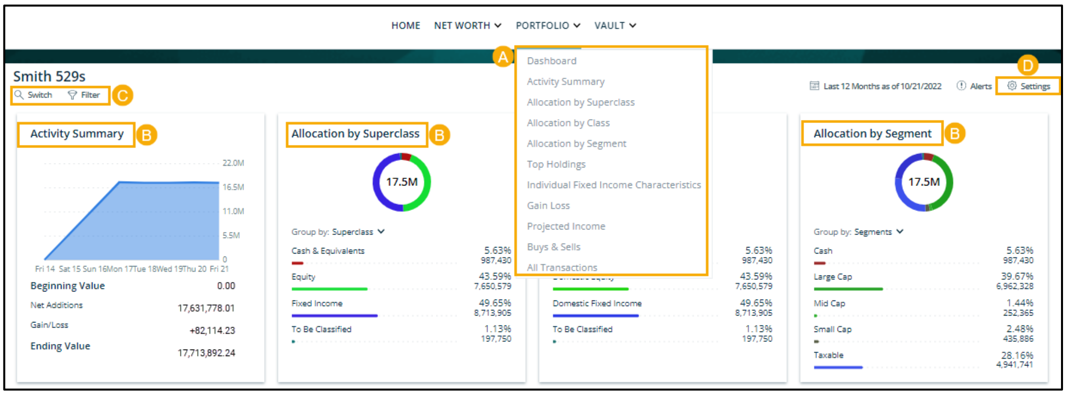
Dashboard

The **Portfolio** dashboard is where you can view additional details about your portfolio. The dashboard gives you a dynamic overview of your portfolio, with cards highlighting key information.



The following dashboard cards are available:

- Activity Summary
- Allocation by Superclass
- Allocation by Class
- Allocation by Segment
- Top Holdings
- Individual Fixed Income Characteristics
- Gain/Loss
- Projected Income
- Buys/Sells
- All Transactions



A. Use the drop-down menu to quickly switch between different card details

B. Click on the title of any card to get more detail

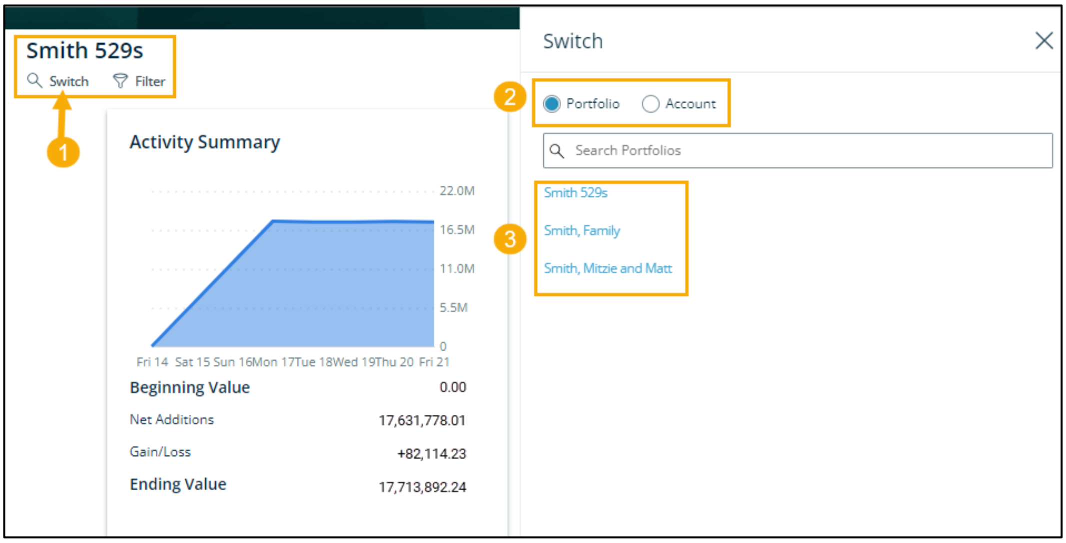
C. **Switch** and **Filter** between portfolios and accounts to update all cards

D. Clicks **Settings** to filter between **All Assets**, **Supervised**, or **Unsupervised** assets

Switch/Filter

The dashboard card can be customized to display selected portfolios or accounts using **Switch** or **Filter**.

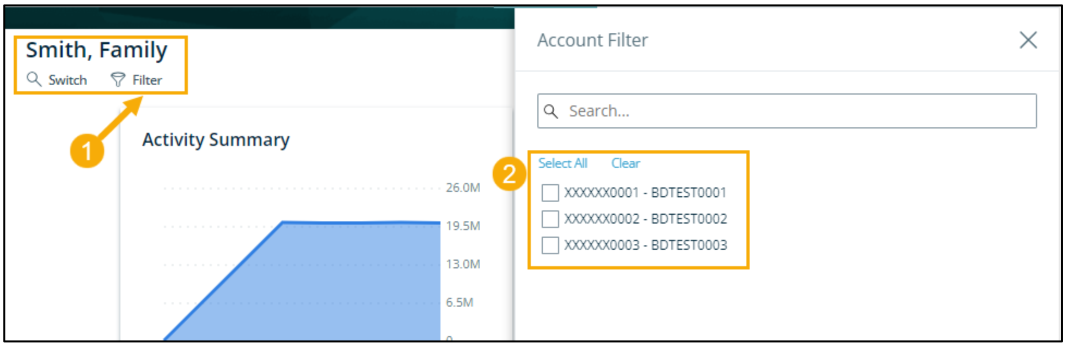
Switch



The name of the current portfolio or account being viewed is displayed on the top left of the page. To switch portfolios or accounts in the view:

1. Click **Switch** under the current portfolio or account name
2. Choose **Portfolio** or **Account** to display available portfolios or accounts to view
3. Select the specific portfolio name or account to view from the list

Filter



To select specific accounts in the portfolio to view, you can use the **Filter** option.

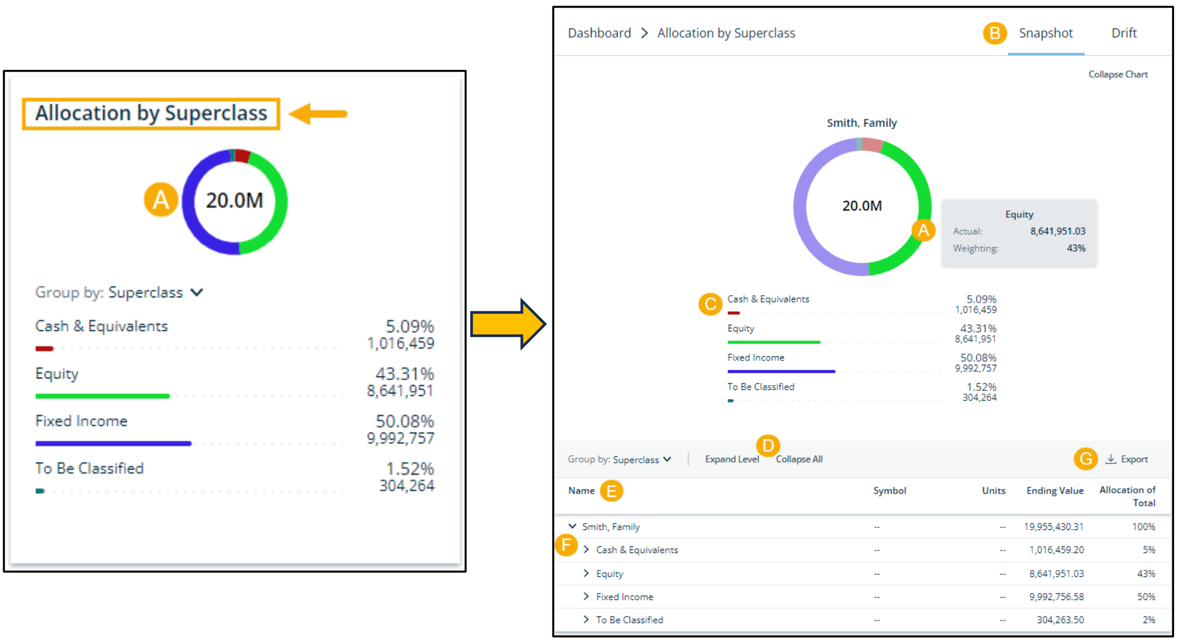
1. Select **Filter** under the portfolio name
2. Check the checkbox next to the specific account(s) to view

Dashboard Card Navigation

View activity and changes in your portfolio or account balance. Each dashboard card displays specific high-level overview and detailed information for your investments.

Dashboard Performance Card

Detailed View

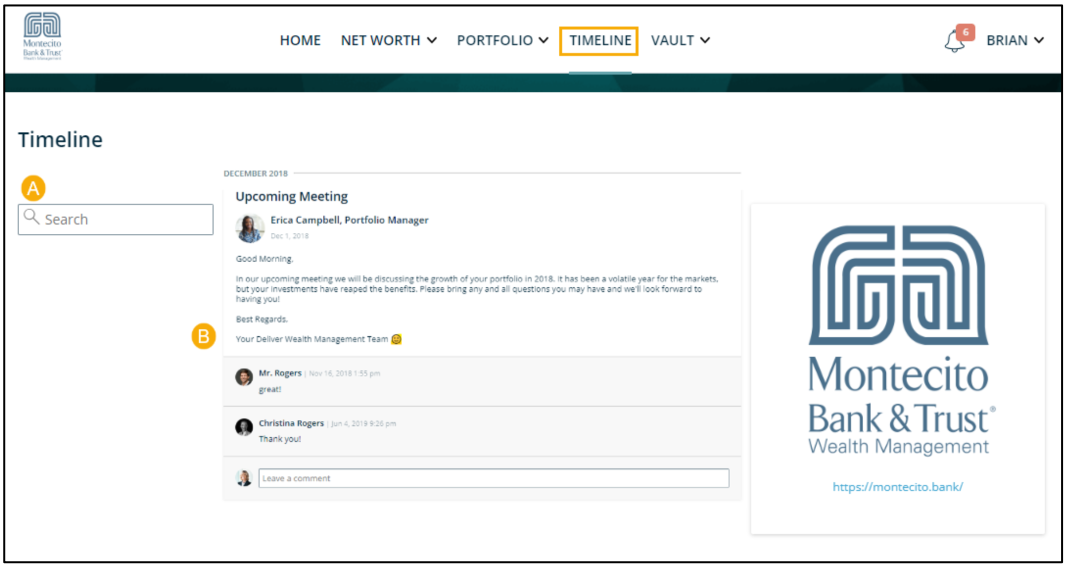


Click on the title of any card for a detailed view.

- **A.** Hover over chart to view market value
- **B.** View **Snapshot** or select **Drift** to view allocations over a period of time
- **C.** View breakdown by type
- **D.** **Expand** or **Collapse All** allocation types
- **E.** Select a field to sort by ascending or descending values
- **F.** Expand allocation type to view further details of the position
- **G.** **Export** data into an excel spreadsheet

Timeline

The Relationship **Timeline** is a feed of posts designed to save interactions between you and your Wealth Management team. You can use the Timeline to document important investment decisions for later reference.

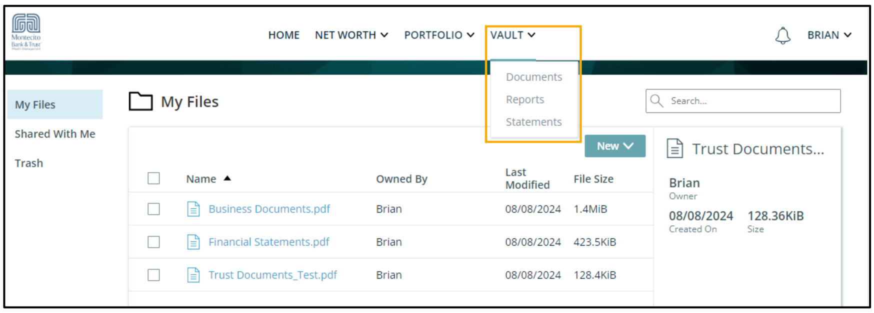


A. **Search** for specific notes or posts

B. View or post a comment

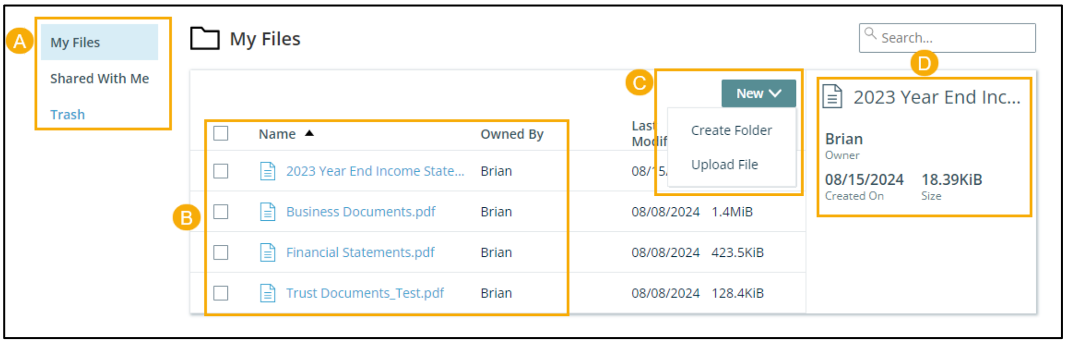
Vault

The **Vault** page is where you can securely share and manage your important financial and legal documents, reports, and statements.



Documents

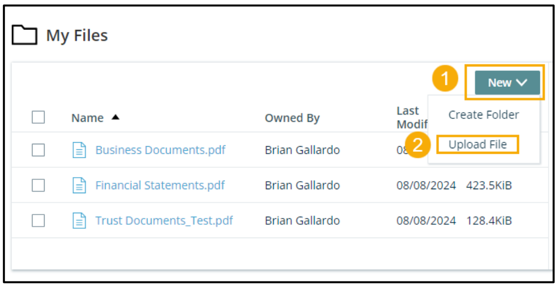
My Files is where you and your advisor can share important documents. You can organize documents into folders, drag-and-drop to upload new documents, and easily move files from one folder to another.

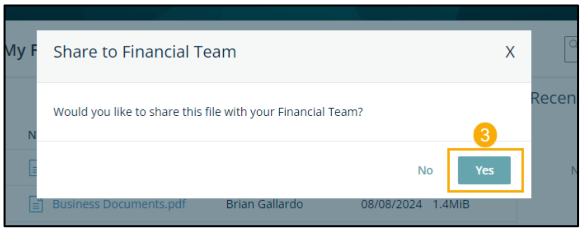


A. **My Files** is your file repository
B. View current files in the folder or add new files by dragging and dropping
C. Select **New** to create a new folder or upload a new file
D. View recent documents that have been shared with an advisor

Share Files

Easily share files with your advisor. An email notification will be sent when a document is shared.

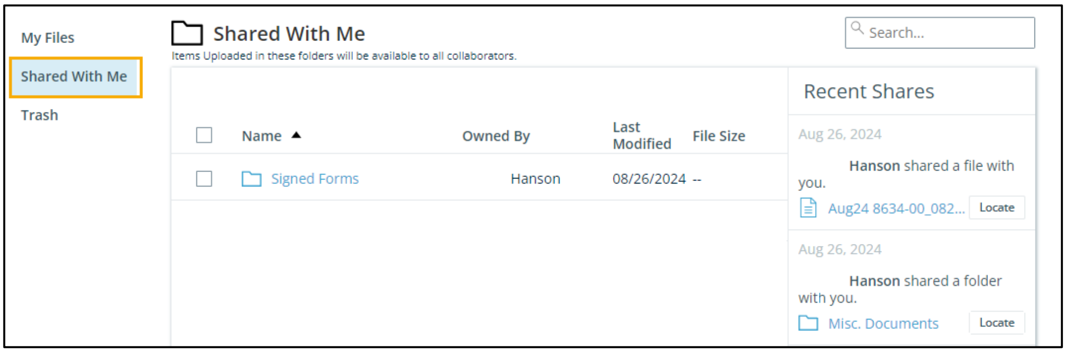




1. Select **New**.
2. Select **Upload File** or drag and drop a file in the My Files section.
3. When prompted, select **Yes** to share the file with your selected advisor.

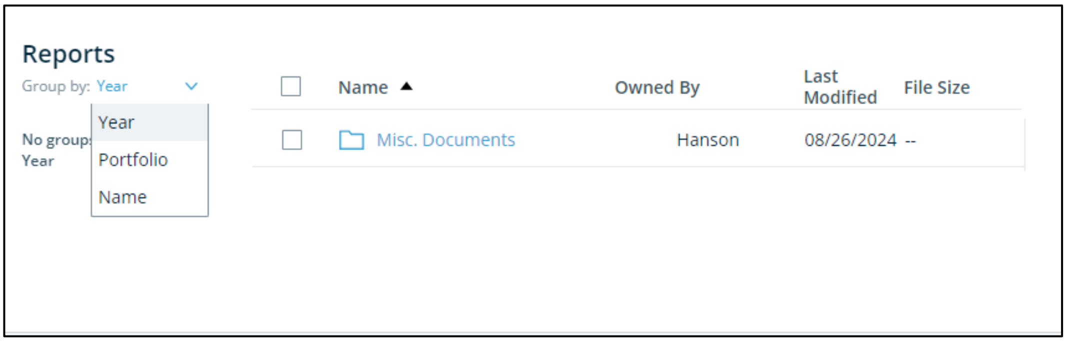
Shared with Me

Shared communication from your advisor can be found in the Shared with Me folder.



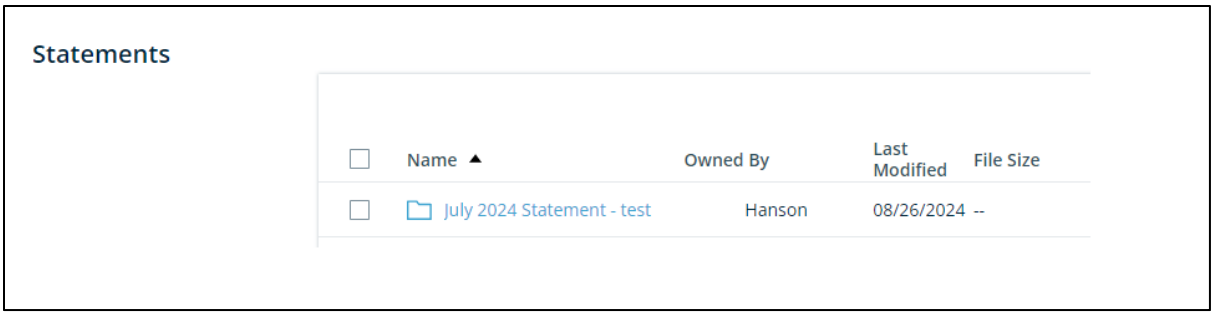
Reports

In the Reports folder, you have quick access to view investment focused reports, such as your Quarterly Report. Reports can be viewed by Year, Portfolio, or Name.



Statements

The Statements folder contains your monthly investment statements.



Thank you!

Have questions? Please contact your Trust Officer or Portfolio Manager for support.