

# CAMBRIDGE — TRUST —

PRIVATE BANKING WEALTH MANAGEMENT



## Cambridge Trust Total Wealth Login Guide



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Wealth is an opportunity to make a difference for your family, your business and the causes you care about. We want to help you make the most of it.

Providing you with 24/7, convenient and secure online access to your Cambridge Trust Wealth Management account and financial information is an important extension of our relationship with you.

**This step by step guide will help you enroll, create a login, and troubleshoot the login process for your account on the Total Wealth portal.**

If you have any questions or need assistance, contact your Relationship Manager or visit the Total Wealth Management Resource Center at <https://www.cambridgetrust.com/totalwealthresourcecenter>.

# Initial Log In (Enrollment)

1. Enter your User ID and temporary password you received via email in the Password field.

The screenshot shows the Cambridge Trust login page. The 'Welcome' section contains a 'User ID' field and a 'Password' field with a 'SHOW' button and a 'Forgot Password' link. Below these fields is an unchecked 'Remember Me' checkbox and a 'Log In' button. A red box highlights the 'User ID' and 'Password' fields. The page also includes a 'Disclaimer | Terms & Conditions | Privacy Policy' footer.

2. Check the "Remember Me" box to register this device, which will enable you to log in with just your User ID and Password. When the box is unchecked, additional verification will be required. Then click the "Log In" button.

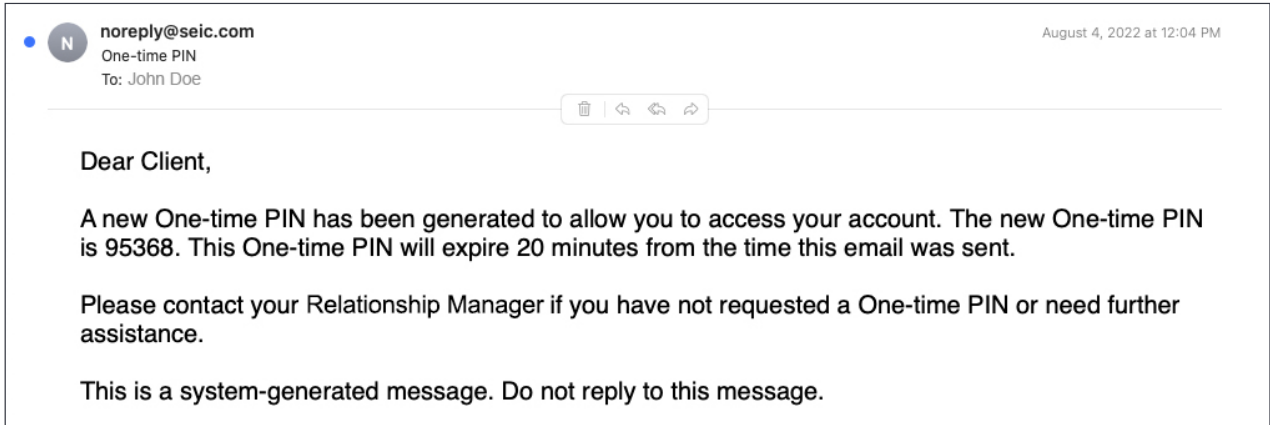
The screenshot shows the Cambridge Trust login page with the 'Remember Me' checkbox checked. The 'User ID' field contains 'JOHNDOE' and the 'Password' field contains '\*\*\*\*\*'. A red box highlights the 'Remember Me' checkbox and the 'Log In' button. The page also includes a 'Disclaimer | Terms & Conditions | Privacy Policy' footer.

**Important: Do not close this window while retrieving the one-time PIN or this process will need to be repeated.**

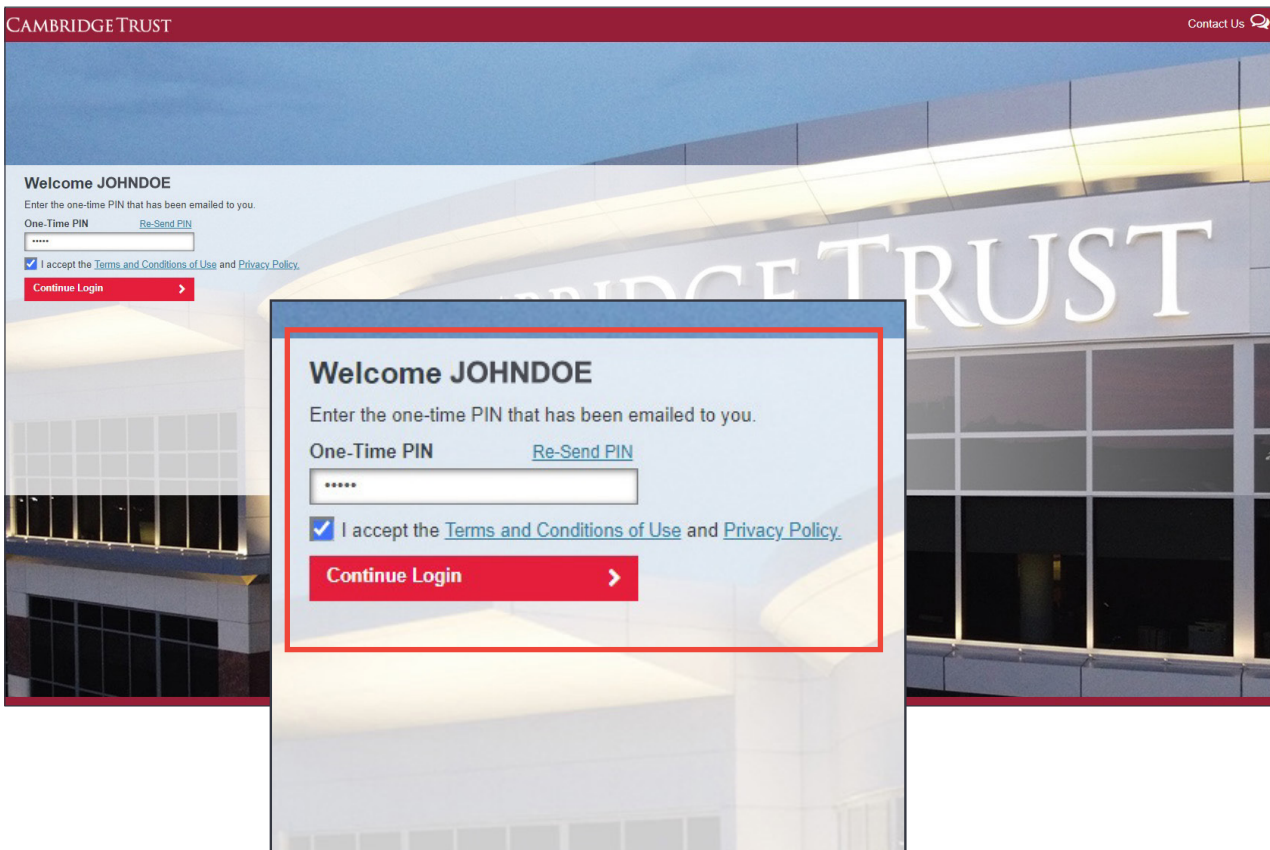


# Enter One-time PIN

You will receive an email containing a one-time PIN. Your one-time PIN will expire 20 minutes from the time you received the email.



3. Enter your one-time PIN. Check the box accept the "Terms and Conditions of Use" and "Privacy Policy" then select "Continue Login."



# Enter Phone Number and Create Security Questions and Answers

4. Create security questions and answers. You may either select security questions or create your own. Then add answers to all before completing the page. As a given question is selected, it is then removed from the available list.

When complete, select "Continue Login."

The screenshot shows the Cambridge Trust user interface. At the top, there is a red header with the Cambridge Trust logo and a "Contact Us" link. Below the header, the user is greeted with "Welcome JOHNDOE". There is a section for contacting the system administrator, with fields for "Type" (set to "Mobile"), "Country" (set to "United States"), and "Phone Number" (set to "5552586025"). Below this, there is a section for selecting security questions and answers. This section contains five rows, each with a dropdown menu for selecting a question and a text input field for entering the answer. The "Continue Login" button is located at the bottom of the form. Red boxes highlight the "Phone Number" field, the security question and answer input fields, and the "Continue Login" button.

**Cambridge Trust** | Contact Us

Welcome JOHNDOE

Contact your System Administrator if you encountered any problems. ⓘ

Type:  Country:  Phone Number:

Please select your Security Questions and Answers. ⓘ

Question #1 or Create Custom Question

Select or enter question #1...

Question #2 or Create Custom Question

Select or enter question #2...

Question #3 or Create Custom Question

Select or enter question #3...

Question #4 or Create Custom Question

Select or enter question #4...

Question #5 or Create Custom Question

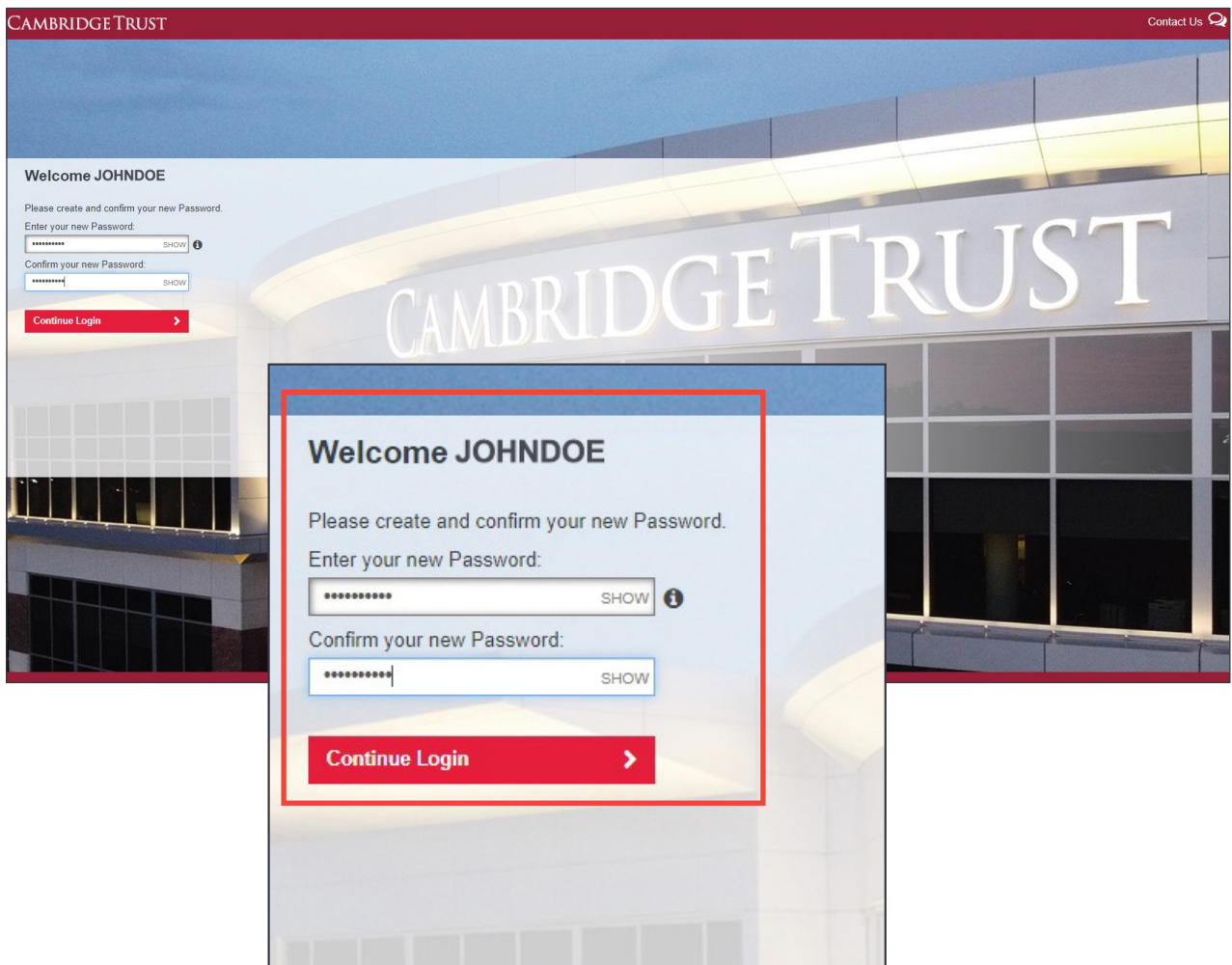
Select or enter question #5...

# Create a New Password

5. Create a new password following these steps:

- Passwords must be between 8 and 20 characters
- Passwords must contain at least one number, one upper case character and one lower case character
- Passwords may have no more than two repeating characters
- You may not reuse any of your last 5 Passwords

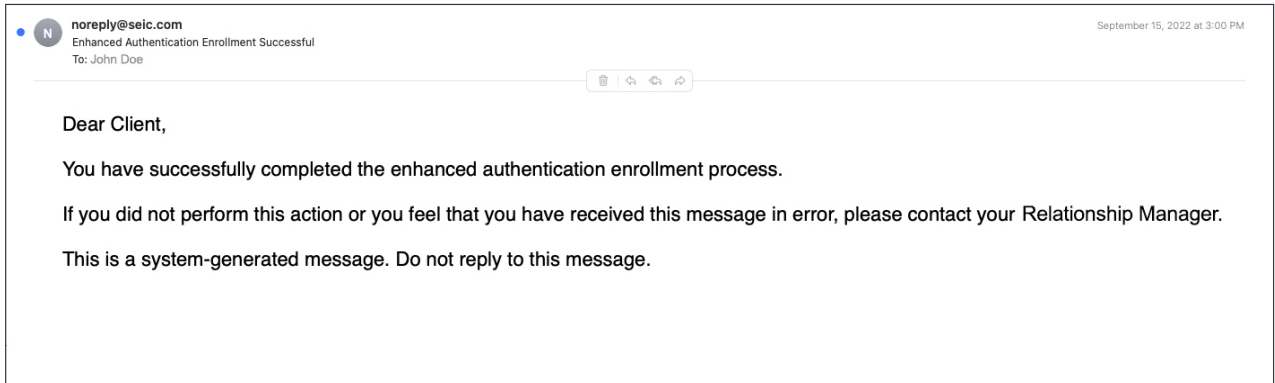
After entering your new password, select "Continue Login."



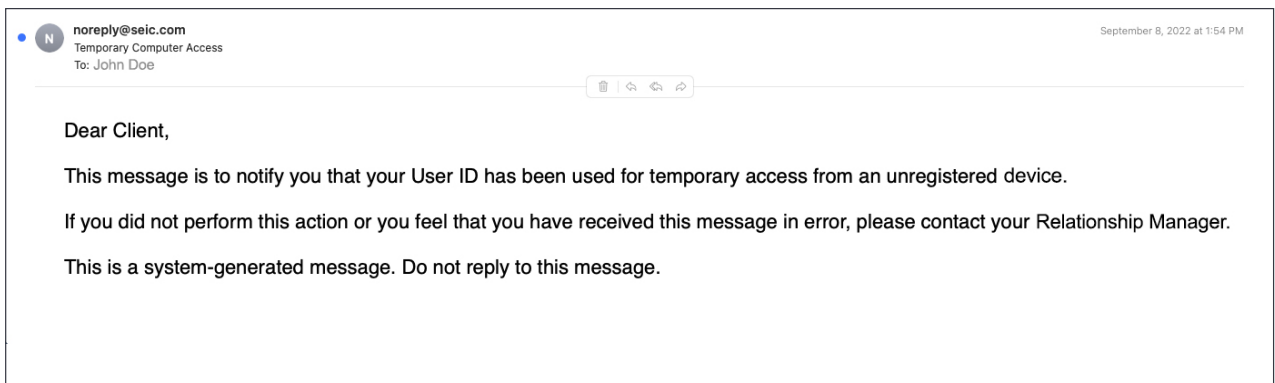
The screenshot displays the Cambridge Trust website's password creation interface. At the top, the Cambridge Trust logo is visible on the left, and a 'Contact Us' link is on the right. The main content area features a 'Welcome JOHNDOE' message. Below this, a prompt reads 'Please create and confirm your new Password.' The form consists of two input fields: 'Enter your new Password:' and 'Confirm your new Password:'. Each field has a 'SHOW' button and an information icon. A red 'Continue Login' button with a right-pointing arrow is positioned below the form. A red rectangular box highlights the entire form area.

# Completed Enrollment Email

You will receive an email validating your enrollment.



Note: Logging in with an unregistered device will send you an email alerting you that your User ID has been used from an unregistered device.







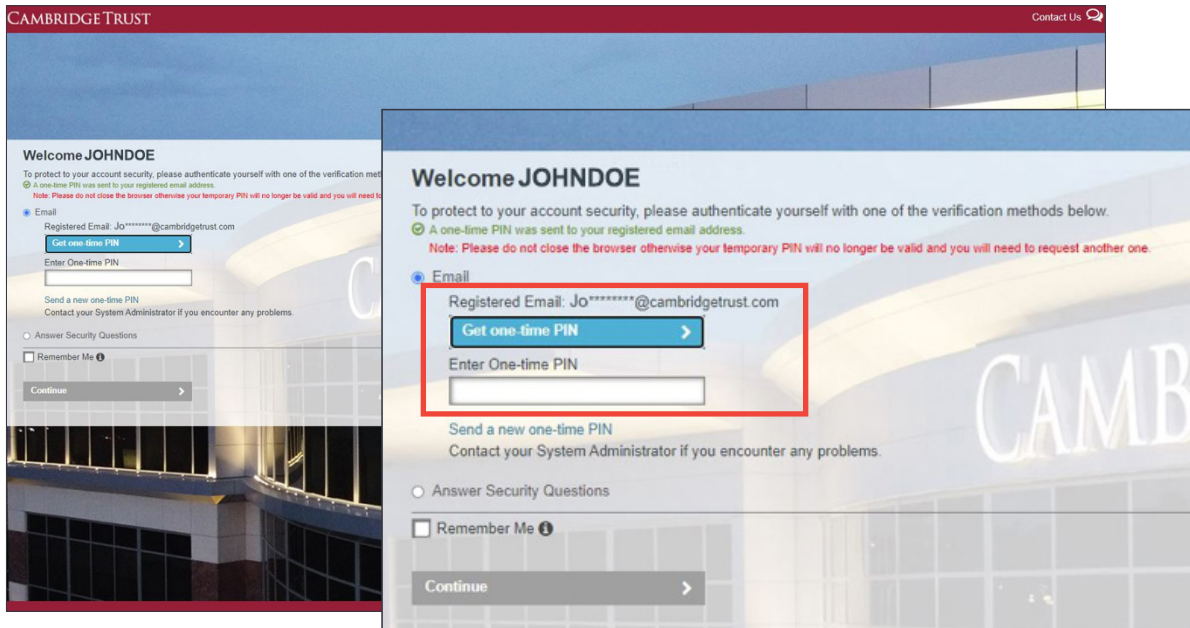
## Logging In as an Enrolled User

1. To log in as an enrolled user, please enter your User ID and Password, then click "Log In."

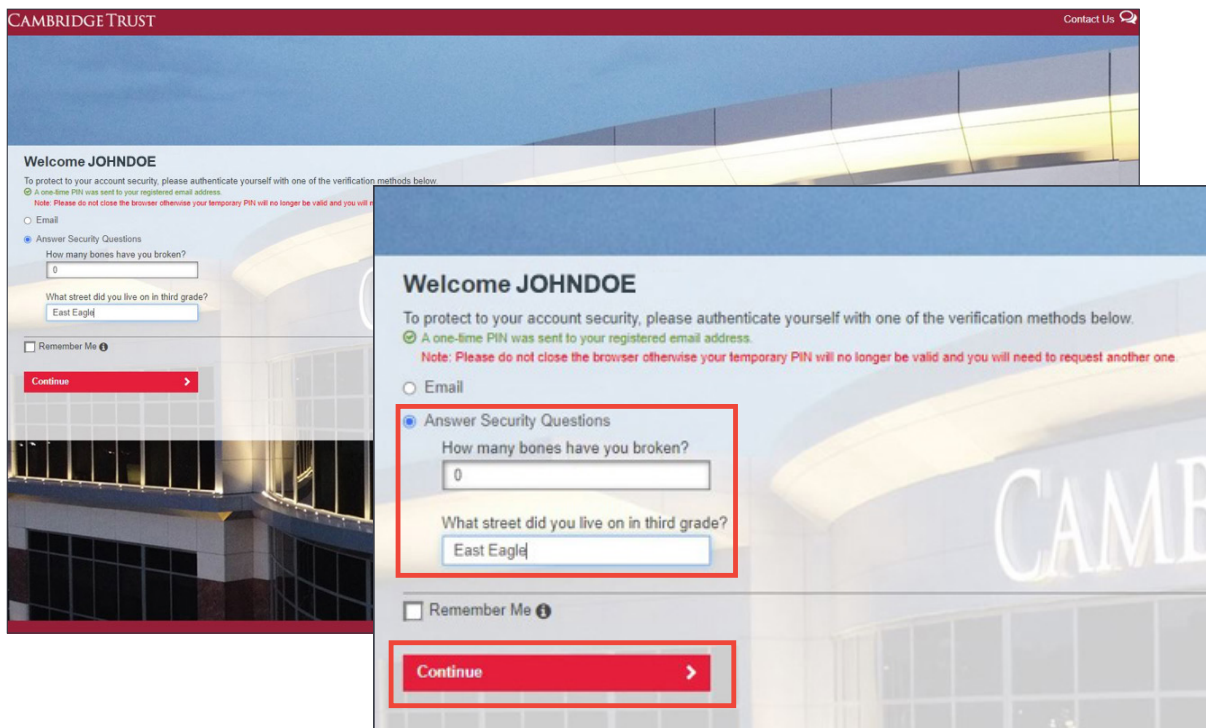
A screenshot of the Cambridge Trust website's login page. The page features a header with the Cambridge Trust logo and a "Contact Us" link. Below the header is a "Welcome" section with a login form. The form includes fields for "User ID" (containing "JOHNDOE") and "Password" (masked with asterisks), a "Remember Me" checkbox, and a red "Log In" button. A "Forgot Password" link is also present. A red rectangular box highlights the "User ID", "Password", "Remember Me", and "Log In" fields. Below the form is a link to "Edit Security Profile" and a disclaimer: "By logging in to this site you agree to the Terms and Conditions of Use and Privacy Policy." The background of the page shows a building with the word "TRUST" on its facade.

# Logging In as an Enrolled User (cont.)

2. If the device is not registered, then select from either entering a one-time PIN

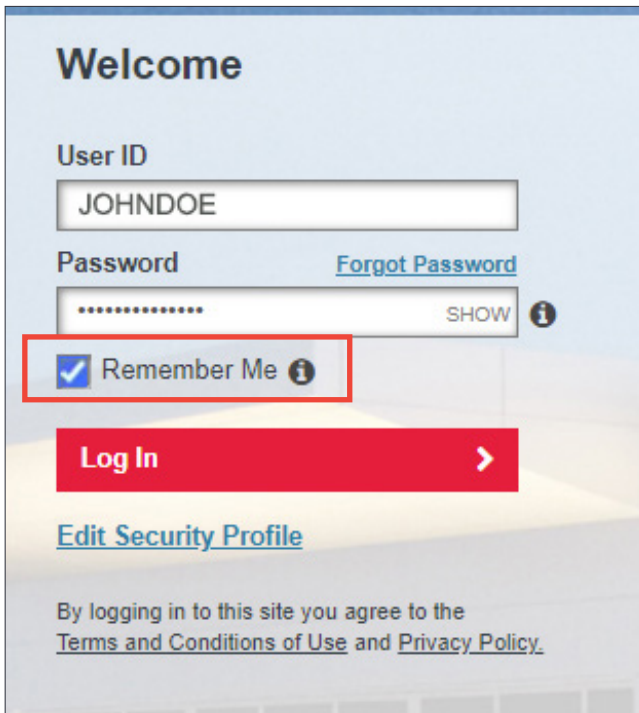


or answering two of your security questions and then selecting "Continue."



# Register/Unregister Device

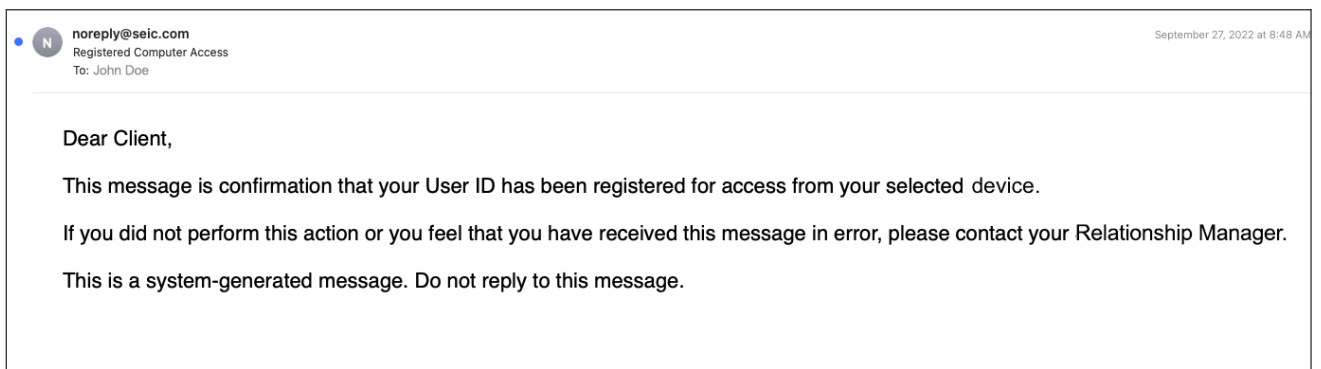
To register a device, select the "Remember Me" checkbox while logging in. Then continue with the log in process. Once you have successfully logged in, the device has been registered and will no longer require entry of a one-time PIN or security questions for future logins.



The screenshot shows a login form titled "Welcome". It includes a "User ID" field with the text "JOHNDOE", a "Password" field with masked characters and a "SHOW" button, and a "Remember Me" checkbox which is checked. Below the password field is a "Forgot Password" link. A red box highlights the "Remember Me" checkbox. At the bottom of the form is a red "Log In" button with a right-pointing arrow, and a link to "Edit Security Profile". A disclaimer at the bottom states: "By logging in to this site you agree to the Terms and Conditions of Use and Privacy Policy."

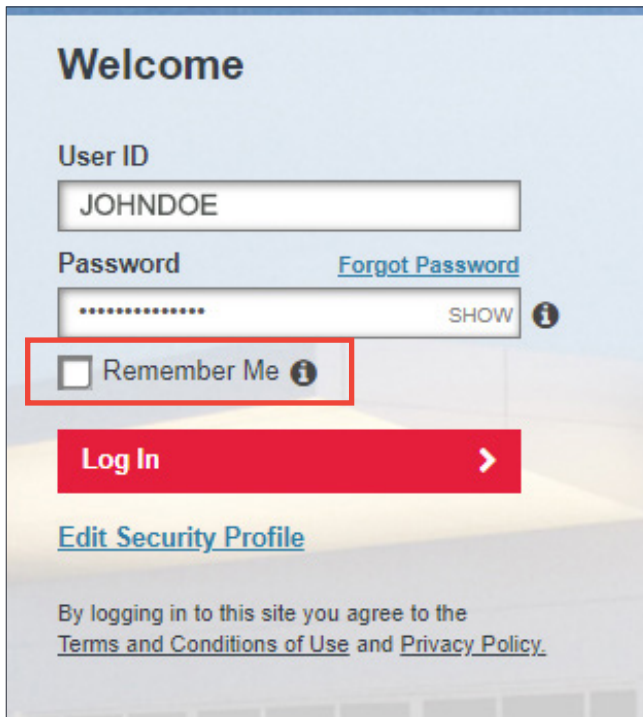
*NOTE: If you log in and out repeatedly within a short time period (for example: while testing the various features of SEI MFA), an SEI MFA security feature will flag you as high risk. This will prevent you from registering the device that is being used for a random time period (between 5 minutes and 24 hours). Once this time period has passed, you will be able to register the device again. This flag does not prevent you from logging in.*

Upon successful registration, you will receive the following email:



# Register/Unregister Device (cont.)

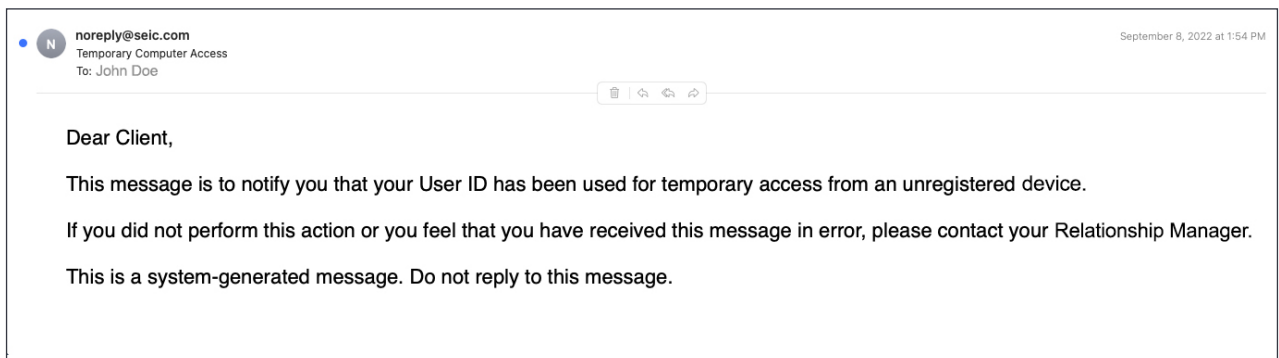
To unregister any device, enter login credentials as usual, but DO NOT click the "Remember Me" button. The device will be unregistered and you will be required to enter a one-time PIN or security questions. Devices may need to be unregistered as you may have used a temporary device while on holiday, etc.



The screenshot shows a login interface with the following elements:

- Welcome** header
- User ID** field containing "JOHNDOE"
- Password** field with a "SHOW" button and an information icon
- Remember Me** checkbox, which is highlighted with a red rectangular box
- Log In** button with a right-pointing arrow
- [Edit Security Profile](#) link
- Footer text: "By logging in to this site you agree to the [Terms and Conditions of Use](#) and [Privacy Policy](#)."

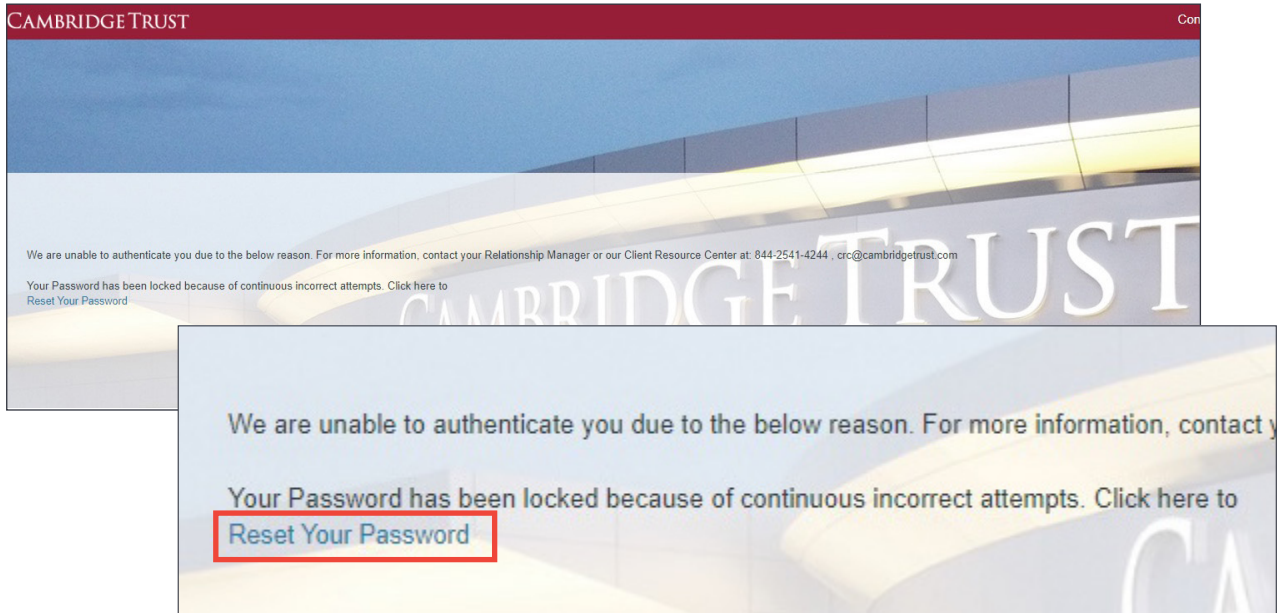
You will receive a confirmation email alerting you that the device has been unregistered.



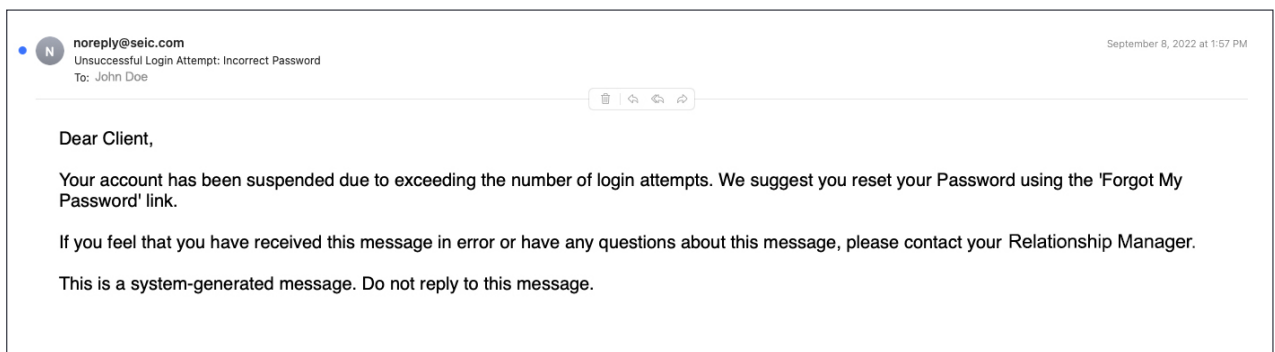


# Locked Password/Failed Login Three Times

If you entered an incorrect password three times, you will be notified with this screen. Select "Reset Your Password."

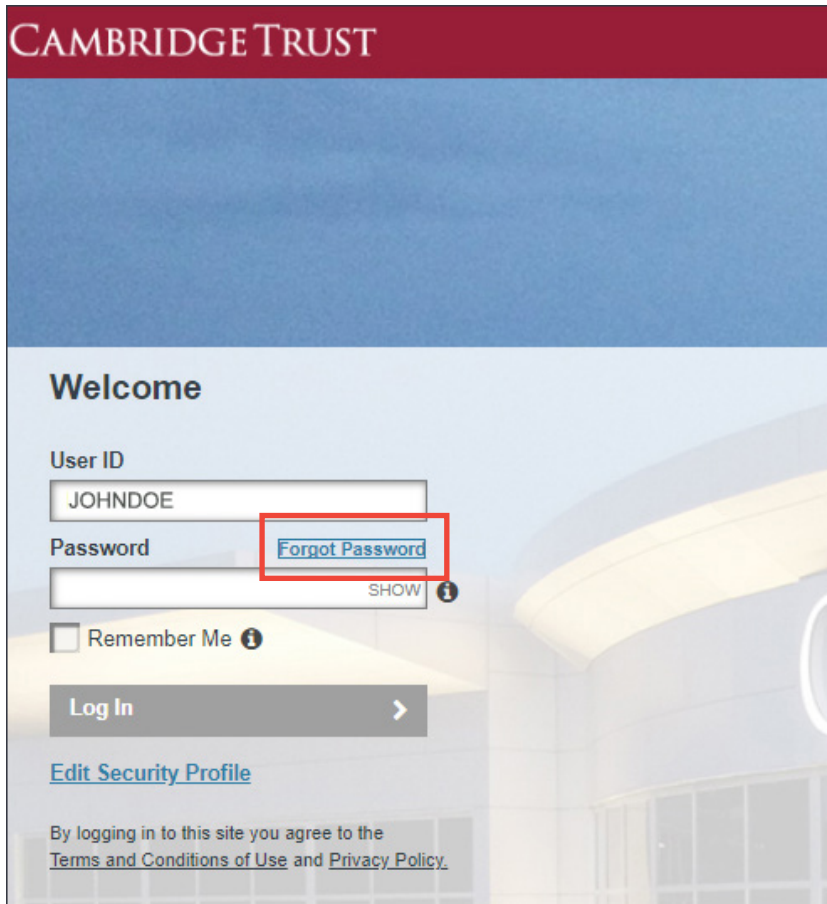


You will receive an email notification alerting you to an unsuccessful login attempt. Follow the instructions in the email to reset your password.



# Forgot Password

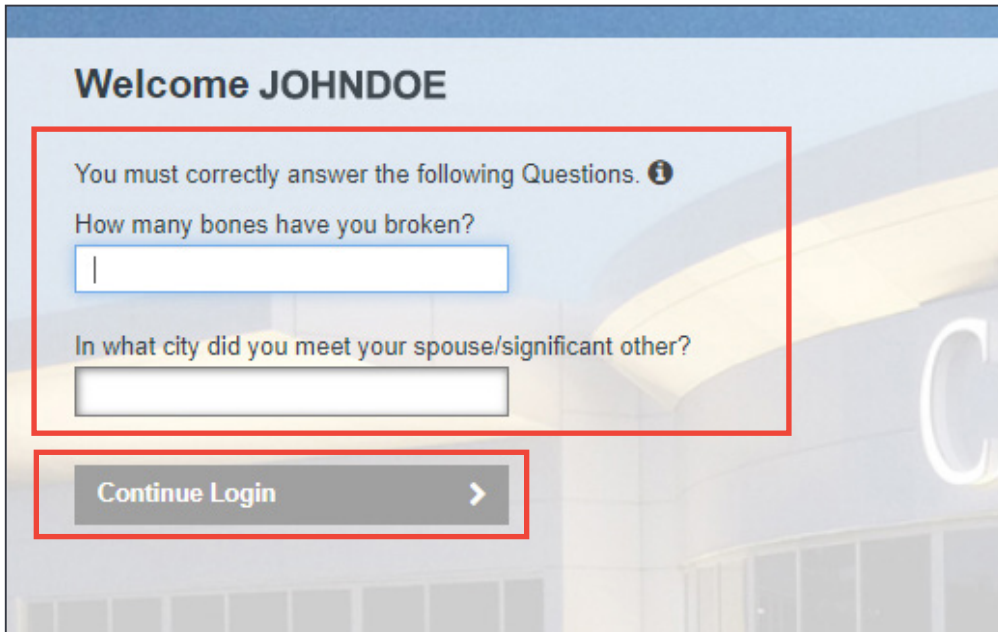
1. If you forgot your Password, enter your User ID and click on "Forgot Password."



The image shows a screenshot of the Cambridge Trust login page. At the top, there is a dark red header with the text "CAMBRIDGE TRUST" in white. Below the header is a blue gradient background. The main content area is white and features a "Welcome" heading. Underneath, there is a "User ID" field containing the text "JOHNDOE". Below that is a "Password" field, which is currently empty. A red rectangular box highlights the "Forgot Password" link located to the right of the password field. To the right of the password field, there is a "SHOW" button with a small information icon. Below the password field, there is a checkbox labeled "Remember Me" with an information icon. A "Log In" button with a right-pointing arrow is positioned below the checkbox. Underneath the "Log In" button, there is a link for "Edit Security Profile". At the bottom of the form, there is a disclaimer: "By logging in to this site you agree to the [Terms and Conditions of Use](#) and [Privacy Policy](#)."

# Forgot Password (cont.)

2. Answer your security questions and click on "Continue Login."



**Welcome JOHNDOE**

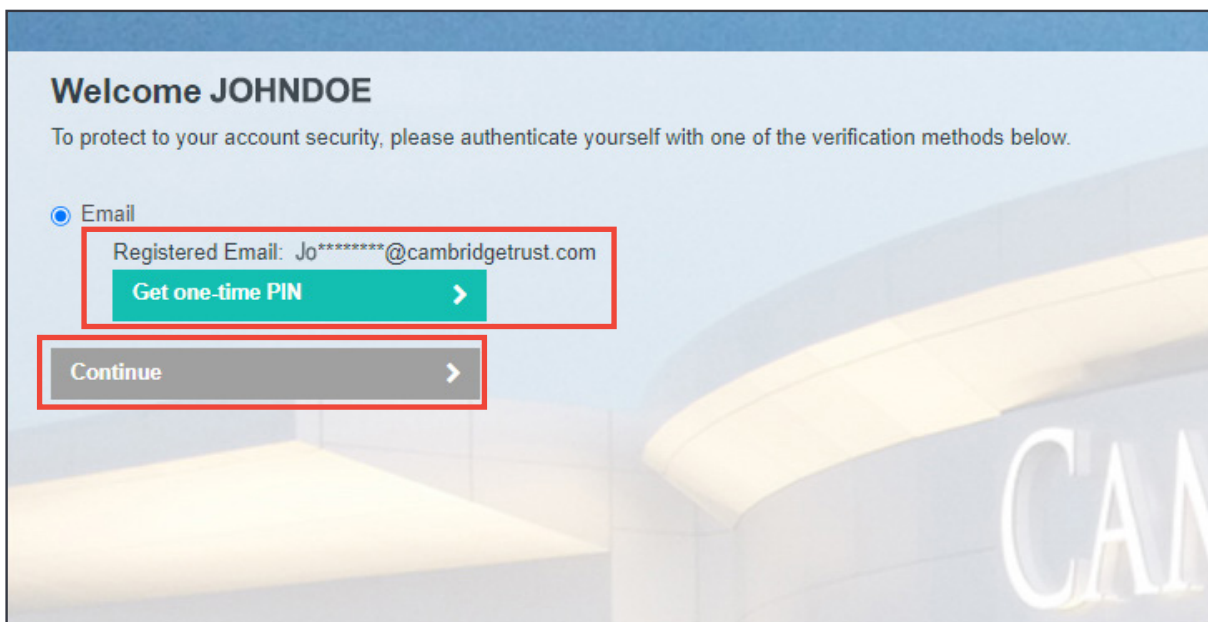
You must correctly answer the following Questions. ⓘ

How many bones have you broken?

In what city did you meet your spouse/significant other?

**Continue Login** >

3. Click on "Get one-time PIN" and then select "Continue."



**Welcome JOHNDOE**

To protect to your account security, please authenticate yourself with one of the verification methods below.

Email

Registered Email: Jo\*\*\*\*\*@cambridgetrust.com

**Get one-time PIN** >

**Continue** >

# Forgot Password (cont.)

4. Enter the one-time PIN you received via email and click "Continue."

**Welcome JOHNDOE**

To protect to your account security, please authenticate yourself with one of the verification methods below.

✔ A one-time PIN was sent to your registered email address.

**Note: Please do not close the browser otherwise your temporary PIN will no longer be valid and you will need to request another one.**

Email

Registered Email: Jo \*\*\*\*\*@cambridgetrust.com

[Get one-time PIN](#)

[Send a new one-time PIN](#)

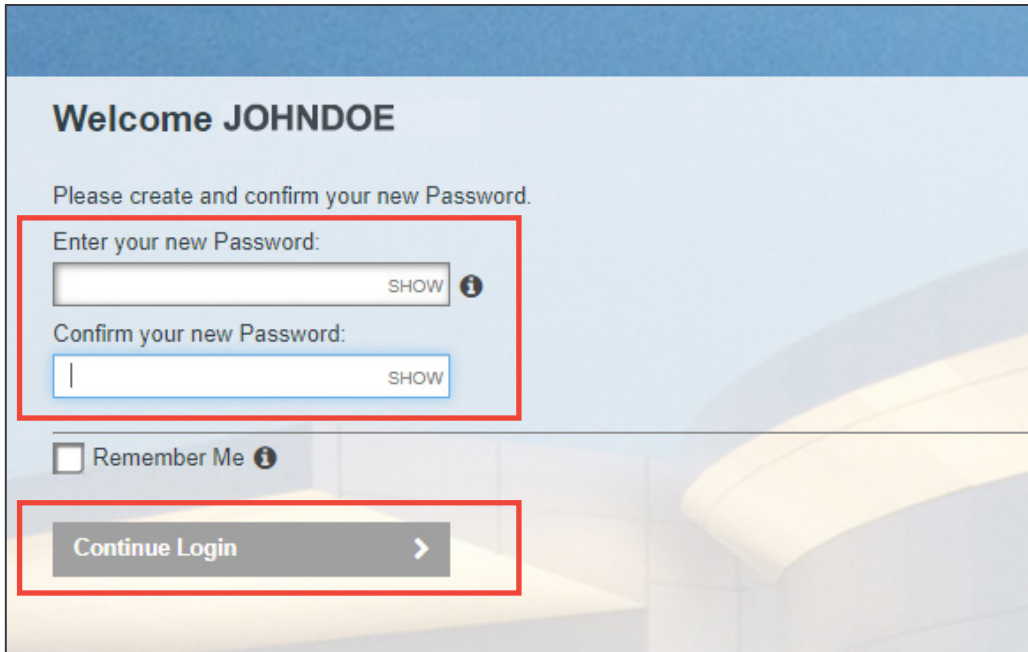
Contact your System Administrator if you encounter any problems.

[Continue](#)



# Forgot Password (cont.)

5. Enter your new Password and confirm. Click "Continue Login."



**Welcome JOHNDOE**

Please create and confirm your new Password.

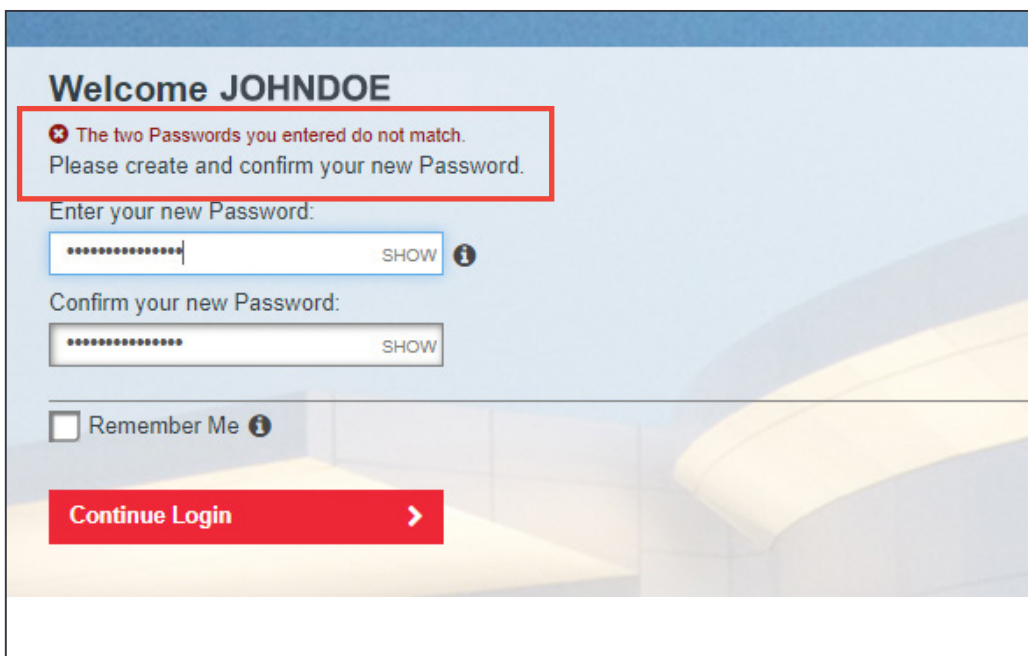
Enter your new Password:  SHOW ⓘ

Confirm your new Password:  SHOW

Remember Me ⓘ

**Continue Login** >

Passwords must match. If any data does not match, then a message will appear in red to warn the user.



**Welcome JOHNDOE**

❌ The two Passwords you entered do not match.  
Please create and confirm your new Password.

Enter your new Password:  SHOW ⓘ

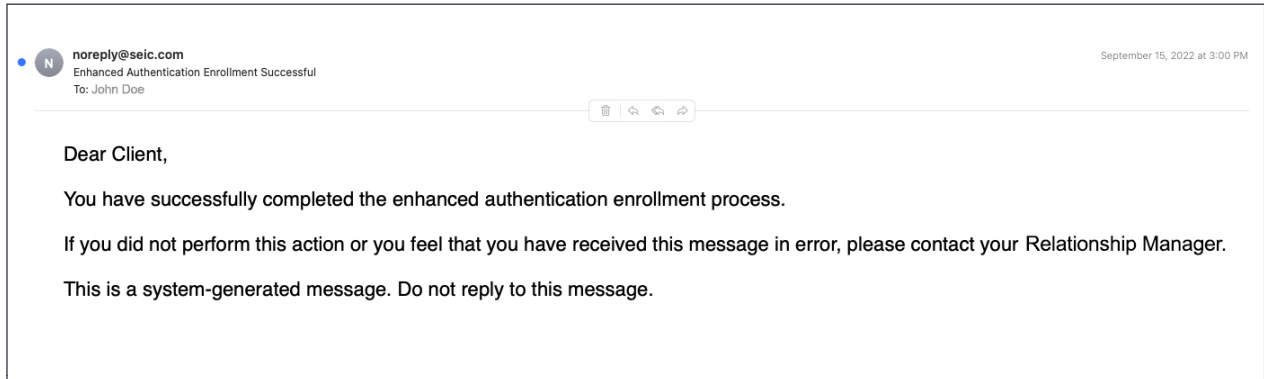
Confirm your new Password:  SHOW

Remember Me ⓘ

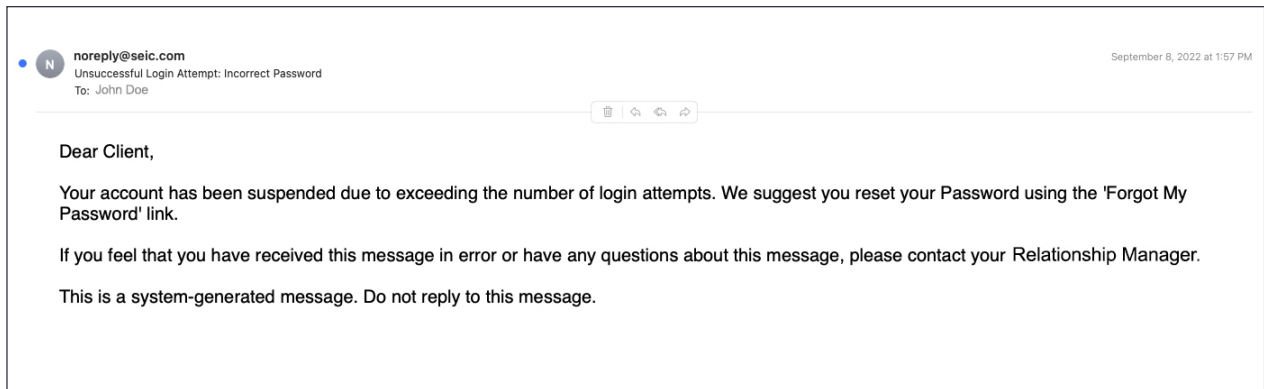
**Continue Login** >

# Forgot Password (cont.)

You will receive an email alerting you to a successful password update.

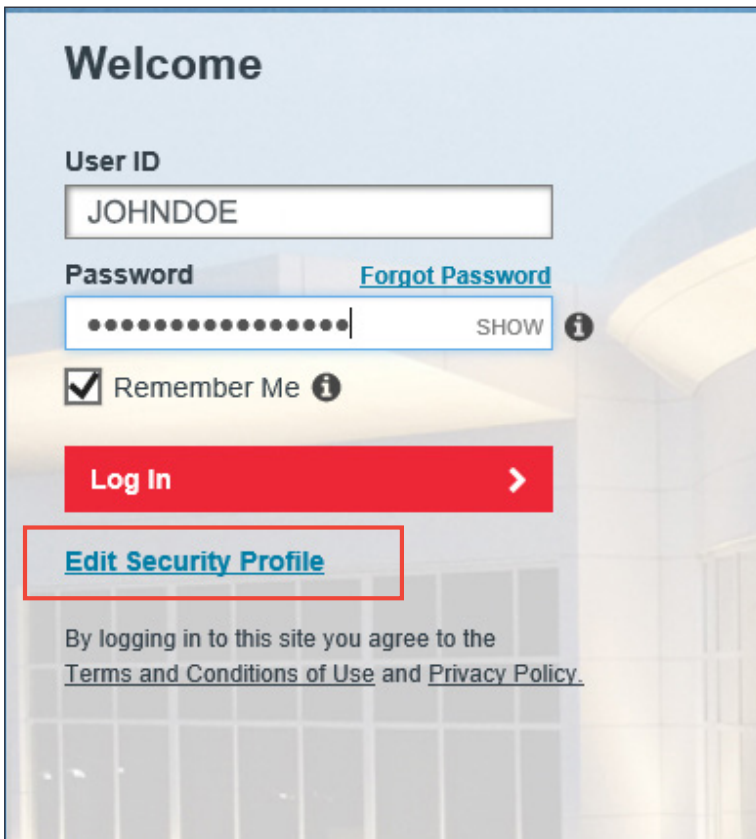


If you failed to correctly answer the security questions three times, you will receive this email. Please contact your Relationship Manager or the Client Resource Center at 844-251-4244 to reset your password.



# Modify Security Profile

To change your phone number, security questions, or password at any time, you can enter your credentials on the main Login screen and select "Login" & "Edit Security Profile." Then proceed to follow the Security Questions or Password instructions as outlined in this guide.



The image shows a login interface with the following elements:

- Welcome** header
- User ID** field containing `JOHNDOE`
- Password** field with masked characters and a `SHOW` button
- [Forgot Password](#) link
- Remember Me** checkbox with an information icon
- Log In** button with a right arrow
- [Edit Security Profile](#) link, highlighted with a red box
- Footer text: **By logging in to this site you agree to the [Terms and Conditions of Use](#) and [Privacy Policy](#).**

# The Way To Wealth

We are a modern private bank offering a full suite of customized financial solutions tailored to you. Whether you need private banking, wealth management, commercial or innovation banking, we are here to power your every ambition.

## Banking Offices

### Massachusetts

Belmont  
Boston (2)  
Cambridge (4)  
Concord  
Lexington  
Needham – North Hill\*  
Newton  
Wellesley (2)  
Weston

### New Hampshire

Bedford  
Dover  
North Hampton  
Portsmouth  
Stratham

## Wealth Management Offices

Boston, MA  
Wellesley, MA  
Concord, NH  
Manchester, NH  
Portsmouth, NH

*\*Limited Service*

Visit [www.CambridgeTrust.com/findlocation](http://www.CambridgeTrust.com/findlocation) for a map, directions, office hours, and phone numbers

# How to Contact Us



Go to **CambridgeTrust.com** for more information.



Call our Client Resource Center at **844-251-4244**



Visit your nearest Cambridge Trust office.

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