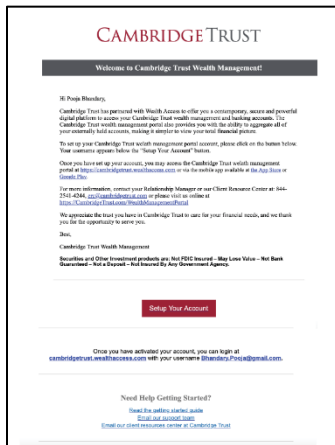


Quick Start Guide

Getting Started

1. You will receive an email inviting you to join Cambridge Trust Wealth Management Portal.
2. Click the '**Setup Your Account**' button. Your email address is your username.



3. Follow the prompts to establish a password, security questions, and your account preferences.

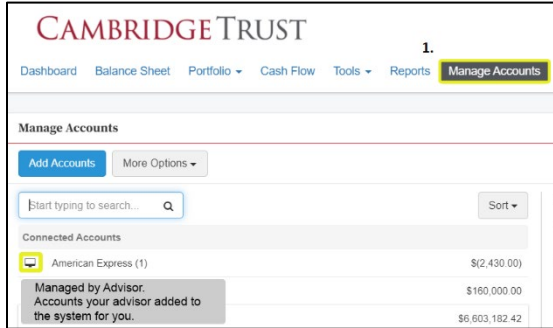
A screenshot of the "Setup Your Account" form. It shows the "Password (Step 1 of 5)" section. The "Username" field is filled with "Bhandard.Pooja@gmail.com". The "Password" field is empty. Below the password field, there are instructions: "Password must:" followed by a list of requirements: "Be at least 10 characters long", "Have at least 1 number", "Have at least 1 lowercase character", "Have at least 1 uppercase character", and "Have at least 1 special character". There is a "Confirm Password" field below the instructions, which is also empty. A blue "Next" button is located at the bottom right of the form.

4. Once you have established your password, security questions and account preferences, log in at <https://cambridgetrust.wealthaccess.com/Account/Login>

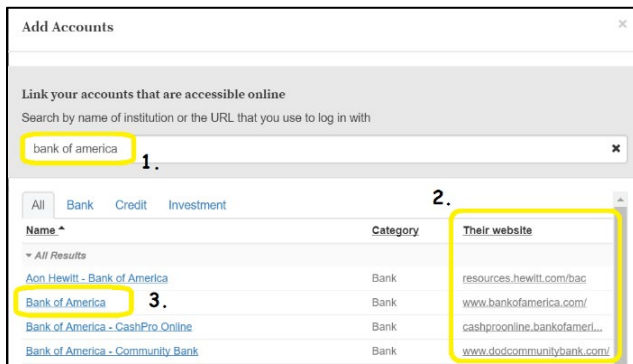
Quick Start Guide

Manage Accounts

1. To view any accounts Cambridge Trust has loaded for you, navigate to **'Manage Accounts'**.



2. To add additional online accounts, click **'Add Accounts'**.
 1. Search for the institution by name or URL.
 2. Verify that you have the correct institution by clicking the appropriate link under **'Their website'**.
 3. Select the name of the institution you wish to add.
 4. Follow the prompts to add the institution.



Quick Start Guide

3. To add an account that does not have online access, click '**Add Accounts**'
 1. Select '**Manually Enter Accounts**'.
 2. Follow the prompts to add the offline account.

Don't have the ability to log in and access your accounts?

Manually Enter Accounts 1.

Use this for things like vehicles or real estate that are not tracked online. Also use this when you are unable to find the website you use to log in or your bank doesn't offer service online.

Add Accounts

Type of Account Account Details Portfolio Diversification Historical Values

What type of account do you want to add? 2.

Real Estate
Your residence(s) and investment properties

Private Investment
Hedge Funds, limited partnership, and investments in companies are a few examples

Personal Property
Cars, art, and jewelry are a few examples

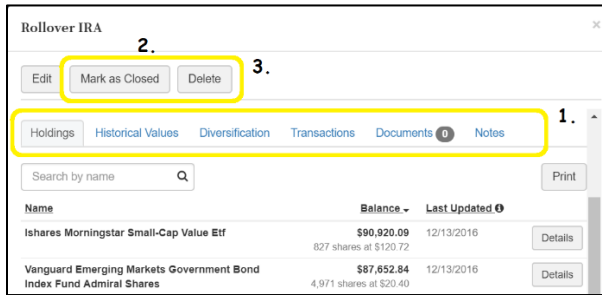
Other Account Types

Banking

Brokerage

Quick Start Guide

4. To view account information, select the account you wish to view and navigate to **'Actions > See Details'**.
 1. From here you can view detailed account information, such as holdings, historical values, and diversification.
 2. To close an account that is no longer active, select **'Mark as Closed'**.
 3. To delete an account that was entered in error, select **'Delete'**.



5. To edit account information, select the account you wish to update and then navigate to **'Actions > Edit'**. From here you can make changes to the asset/liability classifications.

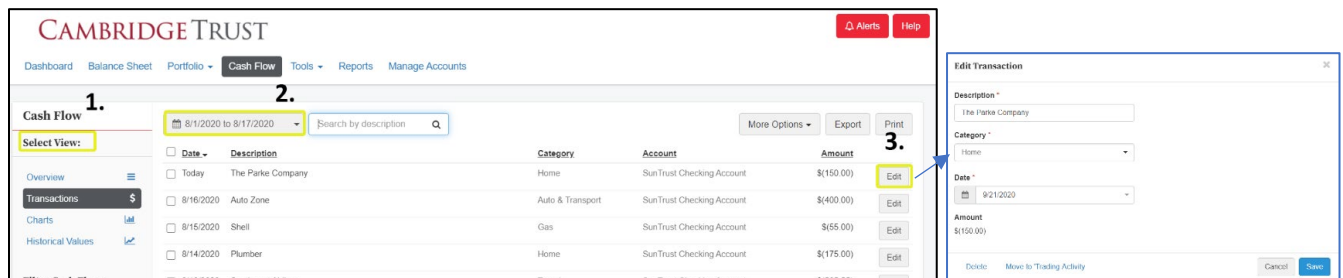
The screenshot shows the 'Edit' form for the 'Rollover IRA' account. The form includes the following fields and options:

- Name ***: Rollover IRA
- Type ***:
 - Asset
 - Liability
- Balance Sheet Category ***: Retirement
- Secondary Category ***: Rollover IRA
- Notes (Optional)**: Add any additional information you want to remember.
- Transactions Type ***:
 - Cash Flow *Include account's transactions in budgeting and tracking income vs expenses.*
 - Trading Activity *Include account's transactions in tracking investment activity.*

Quick Start Guide

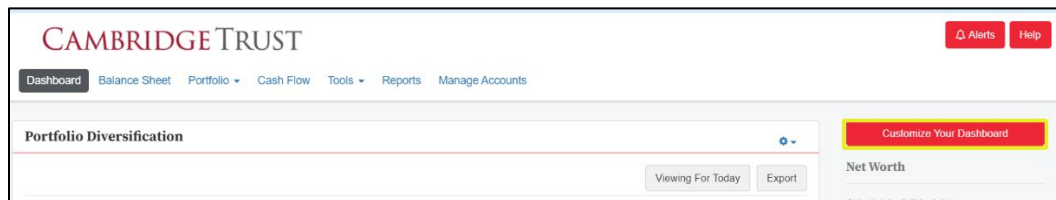
Cash Flow

- You can review cash flow transactions under '**Cash Flow**'.
 - Select a view.
 - Customize the date range using the date range picker.
 - You are able to edit transaction categories for individual transactions by selecting '**Click to edit**'.

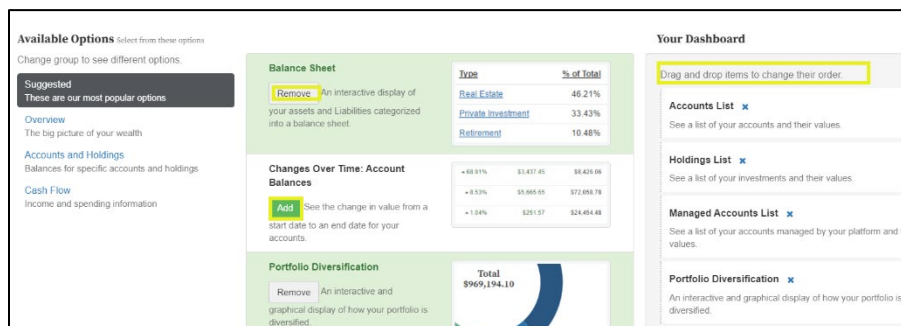


Customize Your Dashboard

- Your dashboard is customizable. You can add/remove/reorder information widgets under '**Dashboard > Customize Your Dashboard**'.



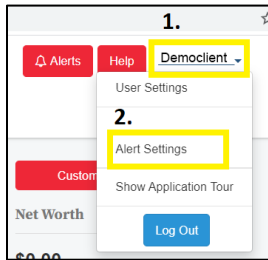
- You can Add, Remove or Reorder the items on your dashboard.



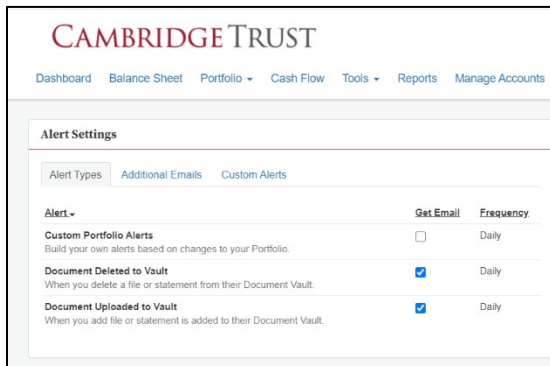
Quick Start Guide

Alerts and Email Settings

1. You can elect to receive automatic email notifications when certain account triggers are met.
 1. Hover over your name in the top right corner of the screen and select '**Alert Settings**'.



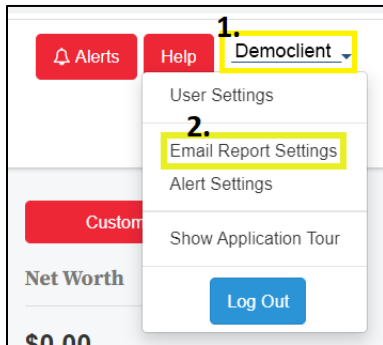
2. Check the checkbox(es) for any triggers you wish to receive emails about. Enter the required information. This can be done at the Portfolio, Institution, or Account level.



3. Scroll down and click '**Save**'.

Quick Start Guide

2. You can elect to receive periodic automatic email reports for your accounts in Cambridge Trust Wealth Management Portal.
 1. Hover over your name in the top right corner of the screen and select **'Email Report Settings'**.



2. Click **'Enable Summary Report'**. Select the frequency of the report to be generated and click **'Save'**.

A screenshot of the 'Email Report Preferences' form. At the top, there is a light blue box with the text: 'Enable an automated overview report. The email will be sent to the primary address for this account.' Below this, there is a checkbox labeled 'Enable Summary Report' which is checked. Underneath, there is a section for 'Email Frequency' with a dropdown menu currently set to 'Weekly'. At the bottom of the form is a blue 'Save' button.

For More Information

Call your Relationship Manager

Call the Client Resources Center: 844-251-4244

Email: crc@cambridgetrust.com

Visit: <https://CambridgeTrust.com/WealthManagementPortal>