CAMBRIDGE TRUST

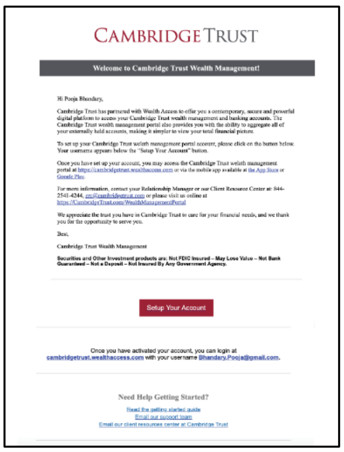
PRIVATE BANKING WEALTH MANAGEMENT

Quick Start Guide

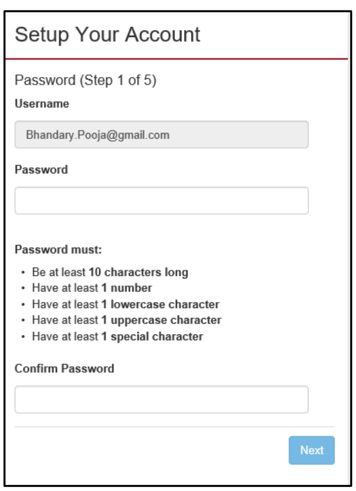
Getting Started

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.



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

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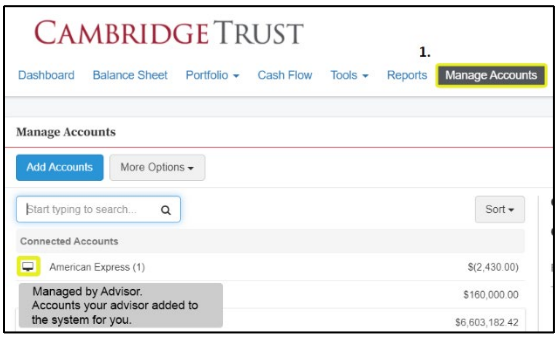
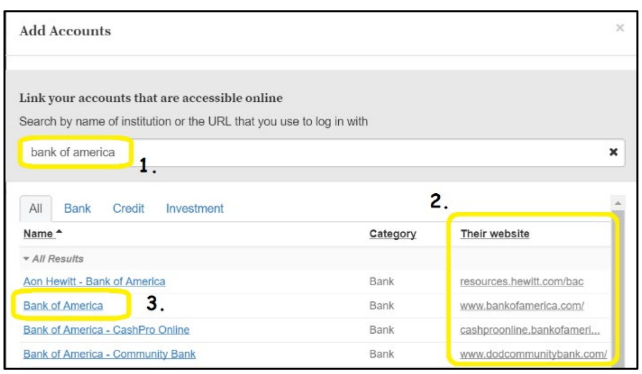
Manage Accounts

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.



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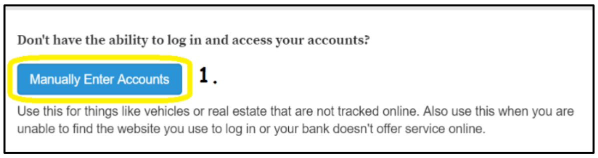
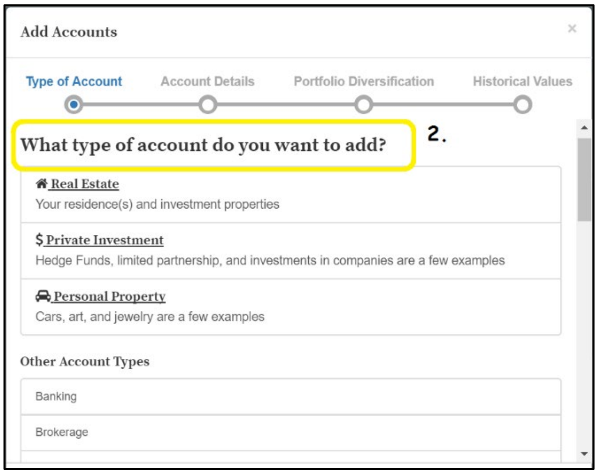
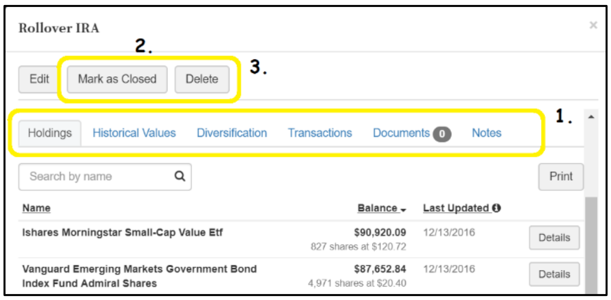
3. To add an account that does not have online access, click '**Add Accounts'**
   1. Select **'Manually Enter Accounts'**.
   2. Follow the prompts to add the offline account.

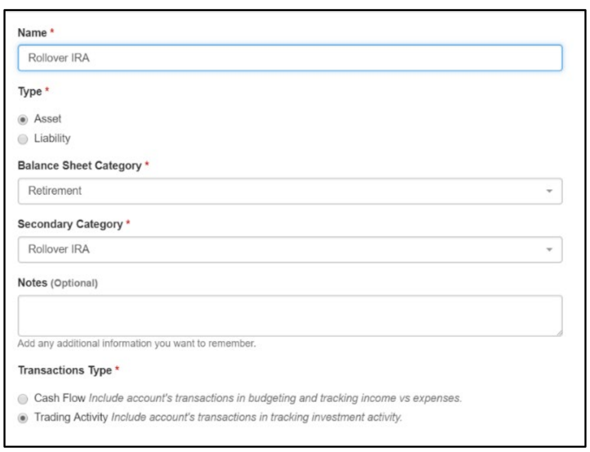




4. To view account information, select the account you wish to view and navigate to **'Actions > See Details'**.
    1. From here you can view detailed account information, such as holdings, historical values, and diversification.
    2. To close an account that is no longer active, select **'Mark as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



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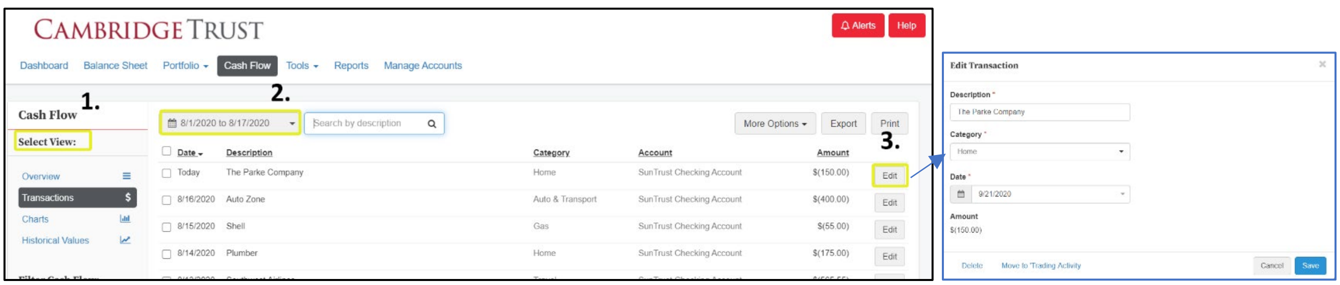
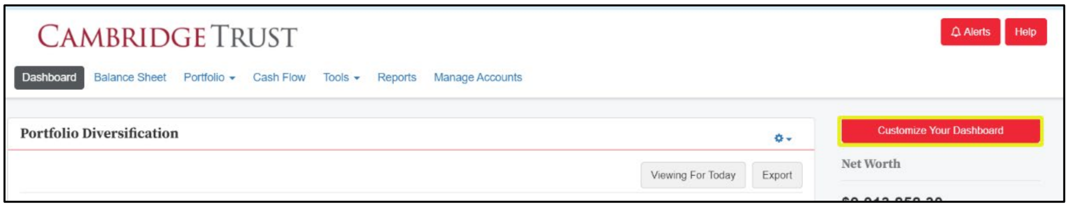
Cash Flow

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

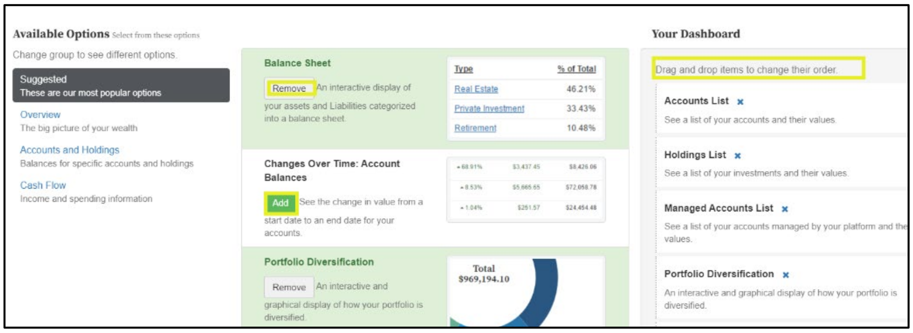


Customize Your Dashboard

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

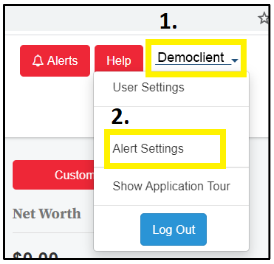


2. You can Add, Remove or Reorder the items on your dashboard.

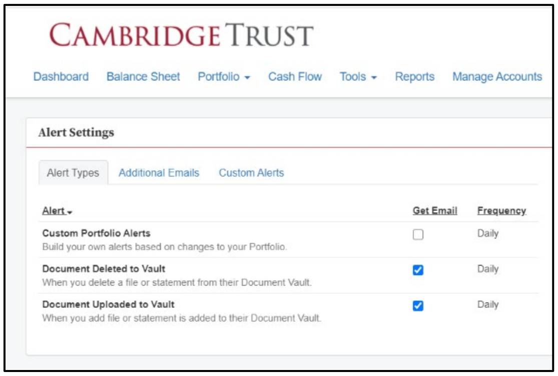


Alerts and Email Settings

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'**.

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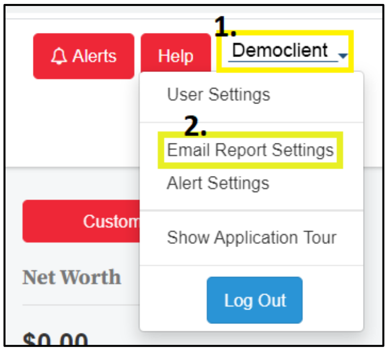
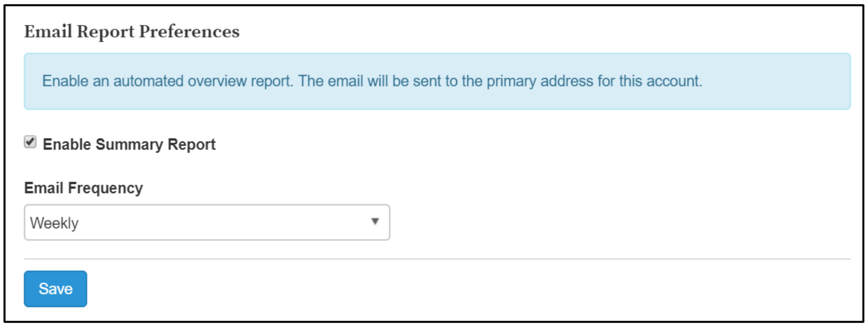
2. You can elect to receive periodic automatic email reports for your accounts in Cambridge Trust Wealth Management Portal.
    1. Hover over your name in the top right corner of the screen and select **'Email Report Settings"**.



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



For More Information

Call your Relationship Manager

Call the Client Resources Center: 844-251-4244

Email: crc@cambridgetrust.com

Visit: https://CambridgeTrust.com/WealthManagementPortal