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> edwardjonestrustcompany.ecx.seic.com

Total Wealth Navigation Guide

Get to know Total Wealth

Welcome to Total Wealth, Edward Jones Trust Company's (EJTC) online account portal. We think you'll find Total Wealth easy to use — thanks to streamlined menus, clear navigation and a responsive layout.

Total Wealth was designed with you in mind. From personalized account information to being able to print documents — accessing account information just got easier.

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Getting started

This guide is a summary of Total Wealth's navigation and features. You'll want to download this guide for future reference as you become familiar with the site.

Ready to explore Total Wealth?

Help keep your account safe with these tips.

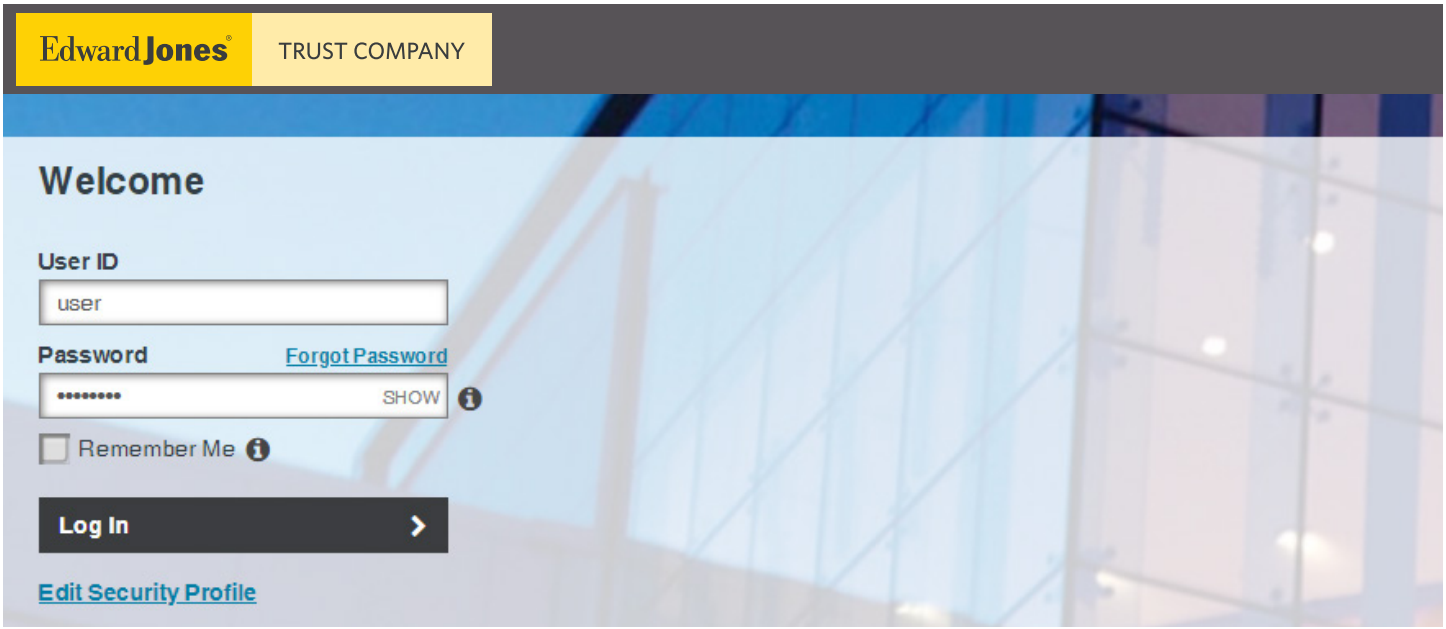
- Use different passwords for each online account. Do not write them down. A password manager can help you track your passwords.
- Never share your login information with another person, no matter who they claim to be. This includes usernames, passwords, authentication codes and security questions/answers.

Step 1:

New user ID & password

First, you'll need to log in to access account information.

Note: You should have received a letter or email from EJTC that provides you with your new user ID and a temporary password. You'll need those to log in to Total Wealth for the first time. If you do not have this information, please call EJTC at 800-445-7224.



Step 2:

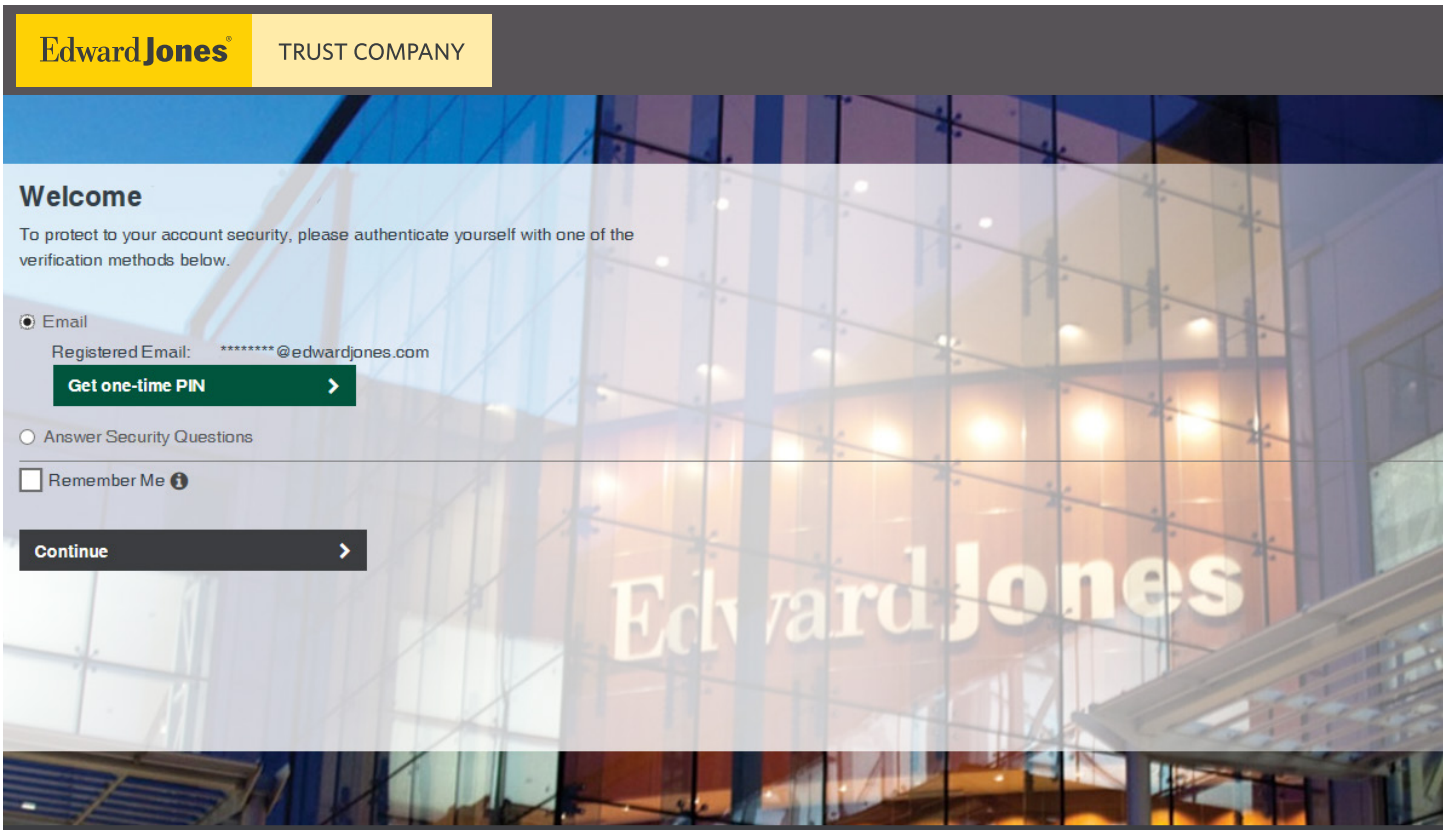
Register this device

Once you enter your login information for the first time, you'll be prompted to "register this device."

If you're accessing Total Wealth from a personal desktop computer or mobile device, selecting the box next to "Remember Me" will retain your information and disable the use of a one-time PIN or security questions to verify the user ID the next time you log in from this device. Note: You should only check the box if you're using a trusted device.

If you don't select "Remember Me," you'll be prompted to input a one-time PIN, which will be sent via email — or you'll need to answer security questions every time you log in.

Once complete, click "Continue."

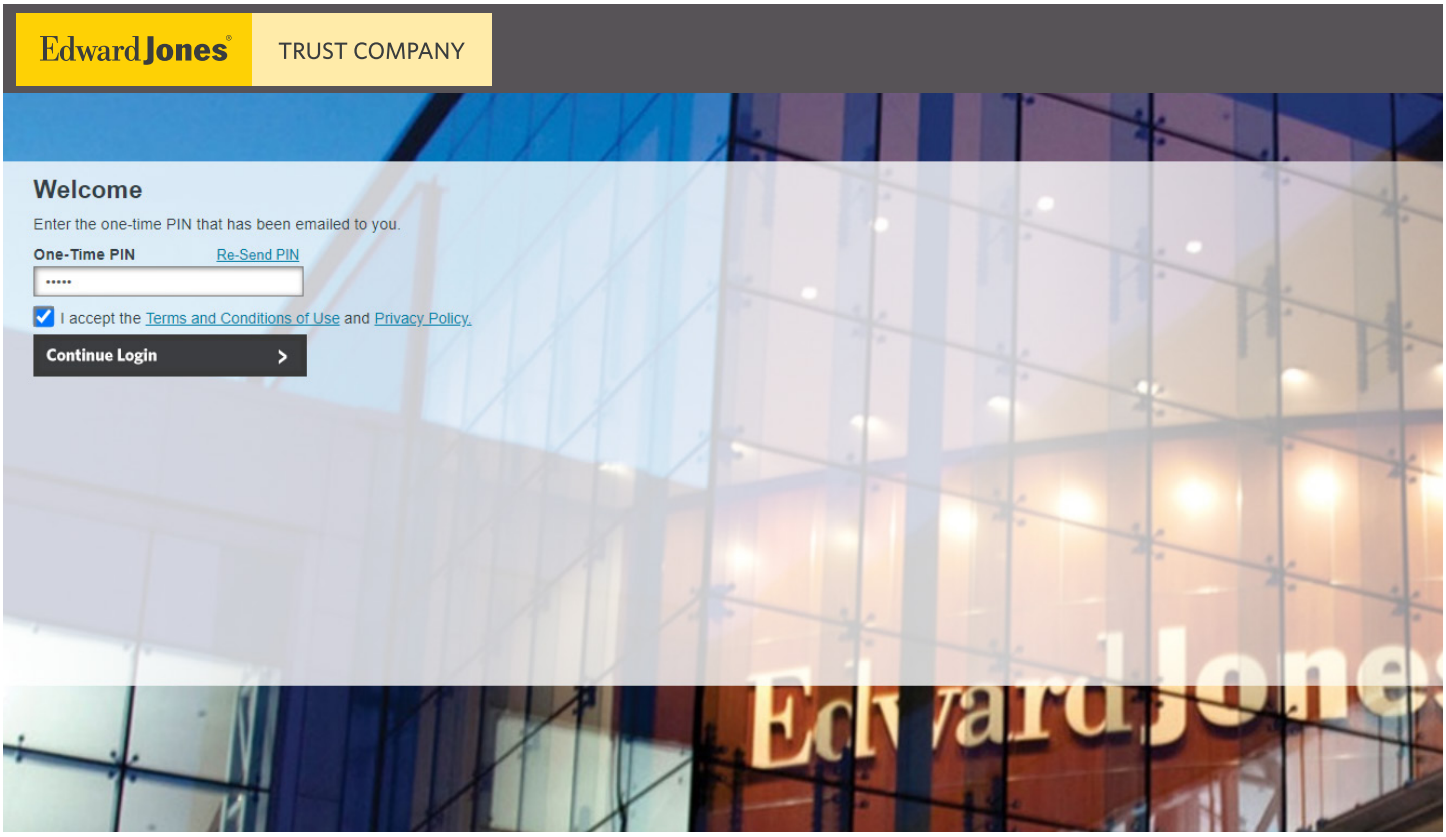


Step 3:

Accept terms & conditions

The next page will ask you to accept the terms and conditions and to enter the one-time PIN that will be emailed to you.

- Check your email for a message from noreply@seic.com.
- This message will contain a one-time PIN to insert into the text box as shown below.
- After you read the terms and conditions carefully, click "Continue Login."



Step 4:

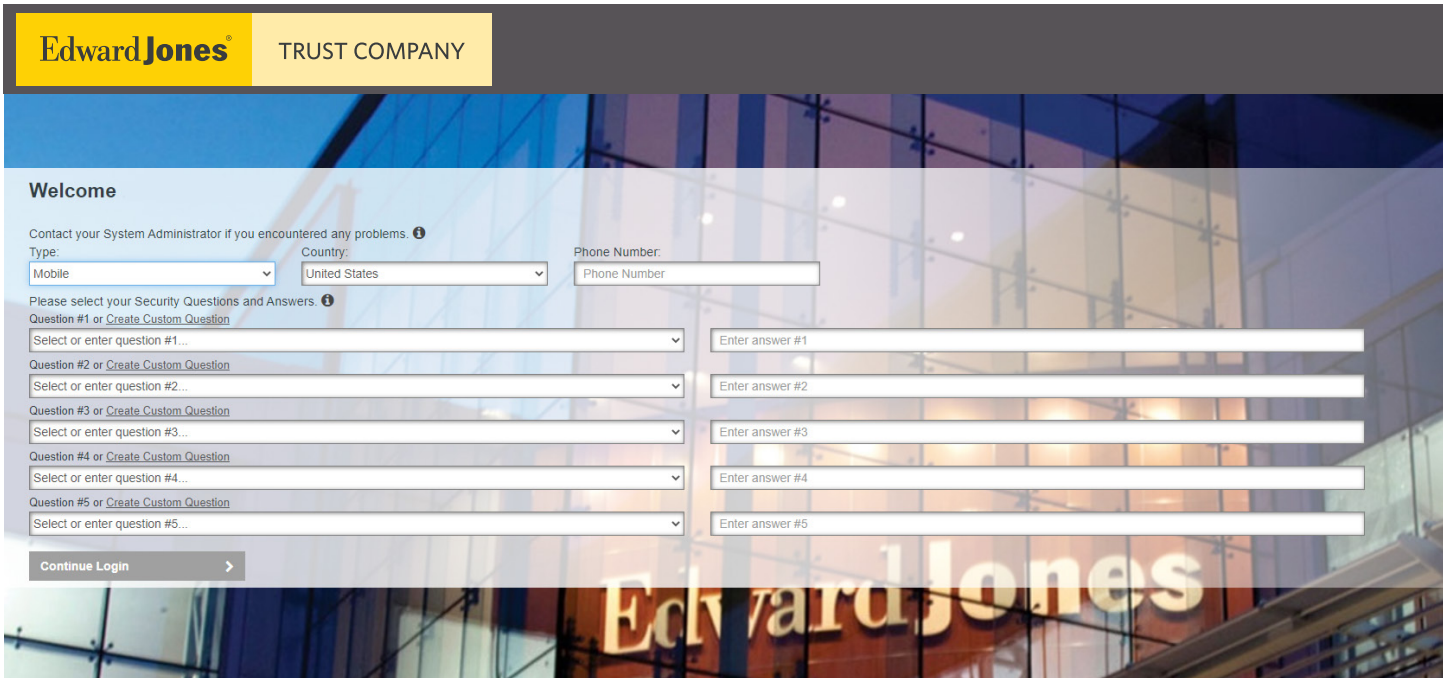
Phone number & security questions

On the next page, you'll add your phone number and select five security questions with answers. You can choose from a list of sample questions or create your own.

Important Notes

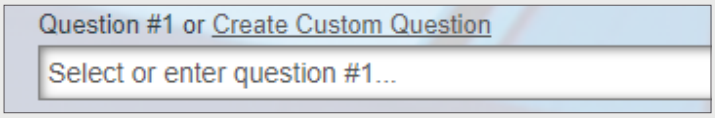
- Security questions and answers cannot be repeated.
- Answers must be between two and 20 characters.
- No special characters are permitted.
- Questions and answers must not have exact matching words.
- Custom questions must contain at least two words.
- Answers are case sensitive.

Once all fields are completed, select "Continue Login" on the bottom left side:



Create custom questions

Click on the underlined link to enable the free form text field.



Step 5:

Create your new password

Your new password must:

- Be unique and kept private.
- Be a minimum of eight characters and a maximum of 20 characters.
- Contain at least one numeric character, one upper-case character and one lower-case character.
- User ID may not appear in the password (e.g., “123JSMITHabc”).
- Password may have no more than two repeating characters in sequence. For example, “A14692BB” is acceptable but “A14692BBB” is not.
- After six months, a password can be reused if five other passwords have been used first.

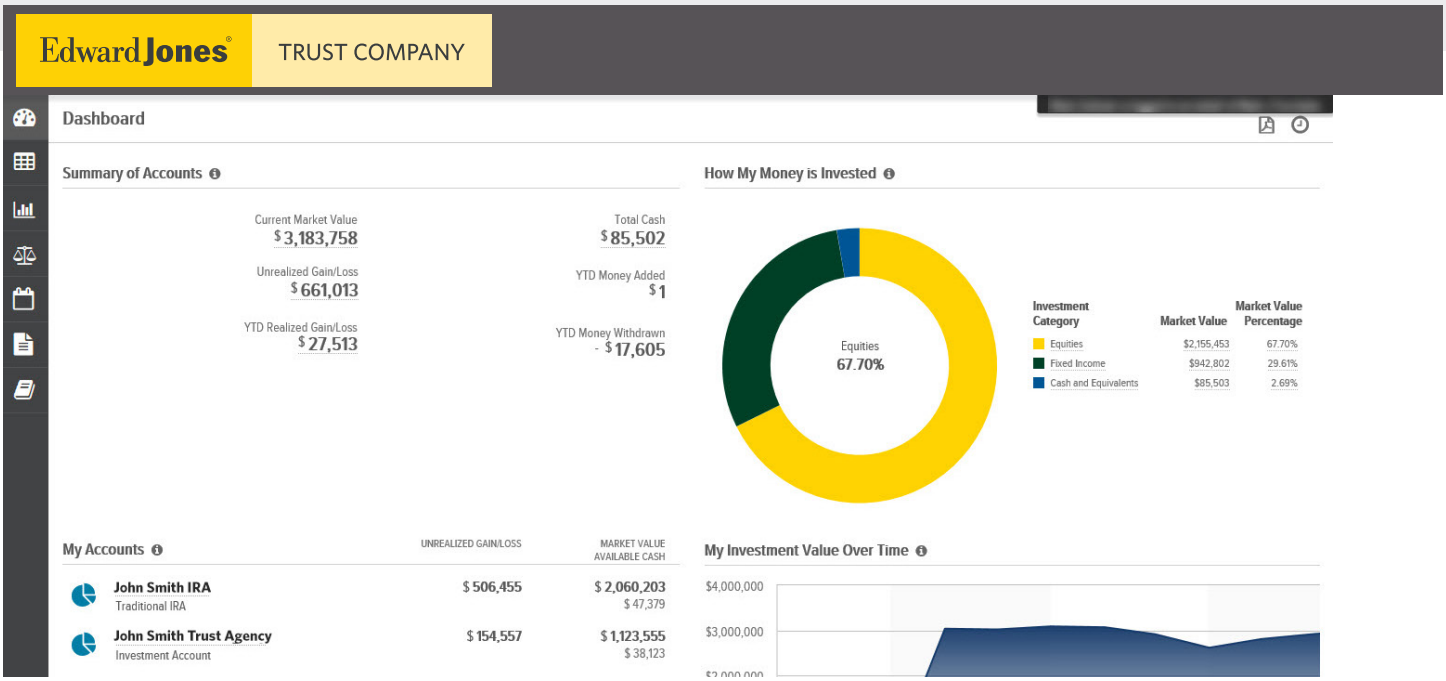
Once you’ve entered your new password, click “Continue Login.”

Success!

If sucessful, you’ll be automatically redirected to the Total Wealth homepage and you’ll receive an email.

Homepage

Once you log in, you'll be on the Total Wealth homepage (the Dashboard tab). Here, you'll see multiple snapshots of key information across your accounts.



Dashboard/ Homepage	The dashboard displays a summary of all accounts, how they are invested and the value of the investments over time.
Investments	The account investments are viewable by Asset Name, Investment Category, Cost Basis, Unrealized Gain/ Loss, Market Value, Estimated Annual Income and more.
Analytics	Here you'll see Market Value over Time, Investment Performance, Net Flows and how the assets are invested. View this information across all the accounts combined or drill down to a specific account.
Realized Gain/Loss	Realized gain/loss page displays the amounts of gains and losses resulting from the sale of securities or capital gain distributions. The Detail view displays all transactions that resulted in a gain or loss. Summary view is a summary of short- and long-term gains and losses for the current year and previous year, as well as unrealized gains/losses.
Transactions	Here you'll see a summarized view of the transactions in the account(s). You may view transactions for all the accounts or a single account by using the account selector in the upper left corner.
Documents	This is where you'll view, print and download tax forms and up to two years of account statements.
Glossary	An alphabetical list of terms and their definitions can be found on the Total Wealth site.

Settings

At the top right corner of every Total Wealth page, you'll see a gear icon.

This is the "Settings" icon that enables you to change the order of dashboard panels and create/edit account groups.

Profile

Next to "Settings," you'll see a silhouette icon.

This is the "Profile" icon.

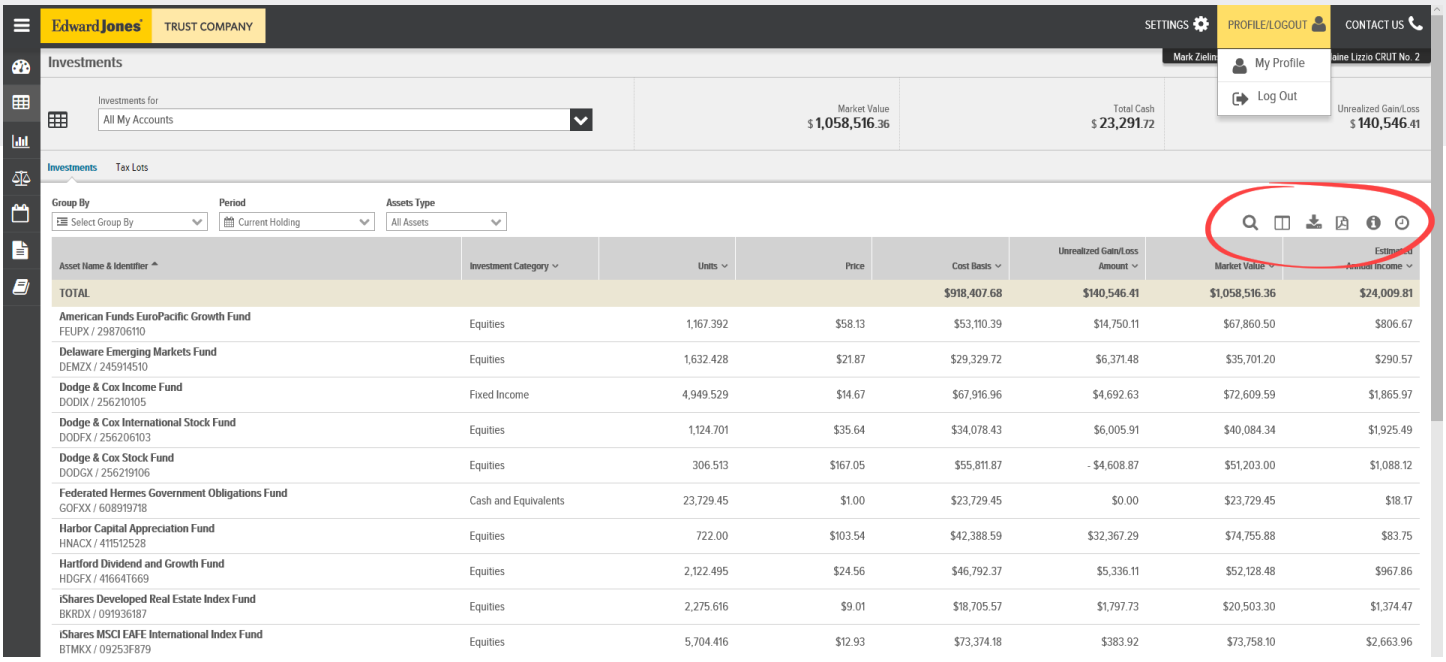
Clicking here allows you to see basic personal information and provides an option to change your email address and **statement delivery method (print and electronic)**. Please note that some account types require an annual printed statement, so your delivery choices may be overridden in certain cases.

Contact Us

On the far right, next to "Contact Us," you'll see a phone icon.

Clicking here displays the members of your Trust Company team and their contact information.

Additional resources



Column selector	The column selectors for the tables that appear on the Investments and Realized Gain/Loss pages are configurable. Within the column selector, you can instantly add or remove columns from the page. Alterations can be made as often as you'd like and will remain in place until you make changes.
Export/print	You'll see the Download and PDF icons on some — but not all — pages. Download: This icon enables you to open or save data in Microsoft Excel. PDF: The PDF icon prompts you to open or save the PDF for viewing or printing.
Clock icon	Clock icons appear throughout the site to indicate the last time pages were updated.
Logging off	You can manually log off by clicking on the "Profile" icon. Note: You'll be automatically logged off after 30 minutes of inactivity.

More information

Visit the EJTC website to learn more about all Trust Company solutions.
> edwardjonestrustcompany.ecx.seic.com