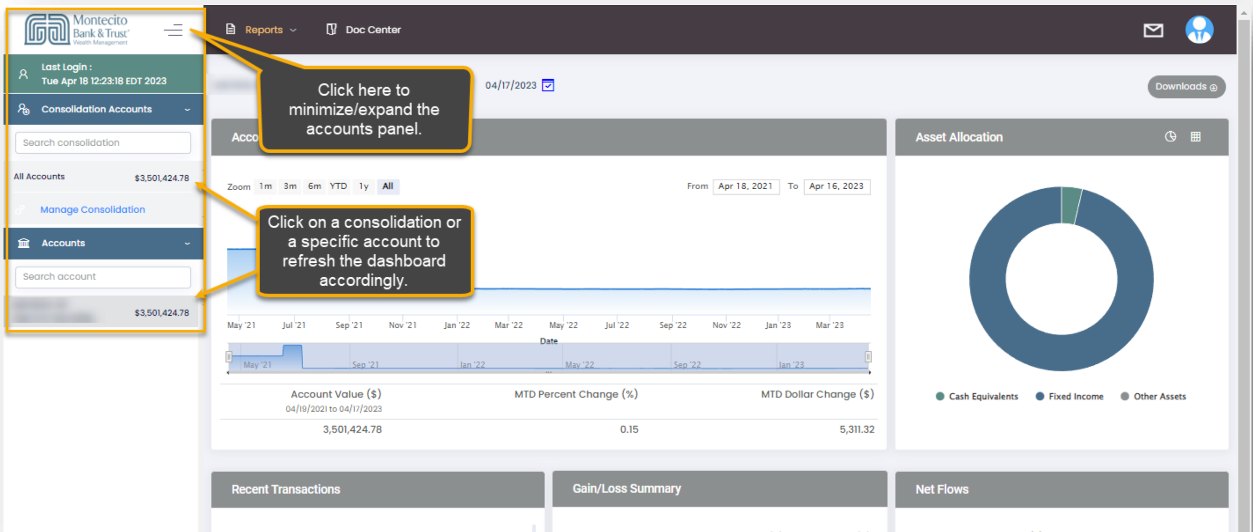
TrustReporter has a new look!
Here are some tips to help you navigate the updated dashboard.

Accounts Panel

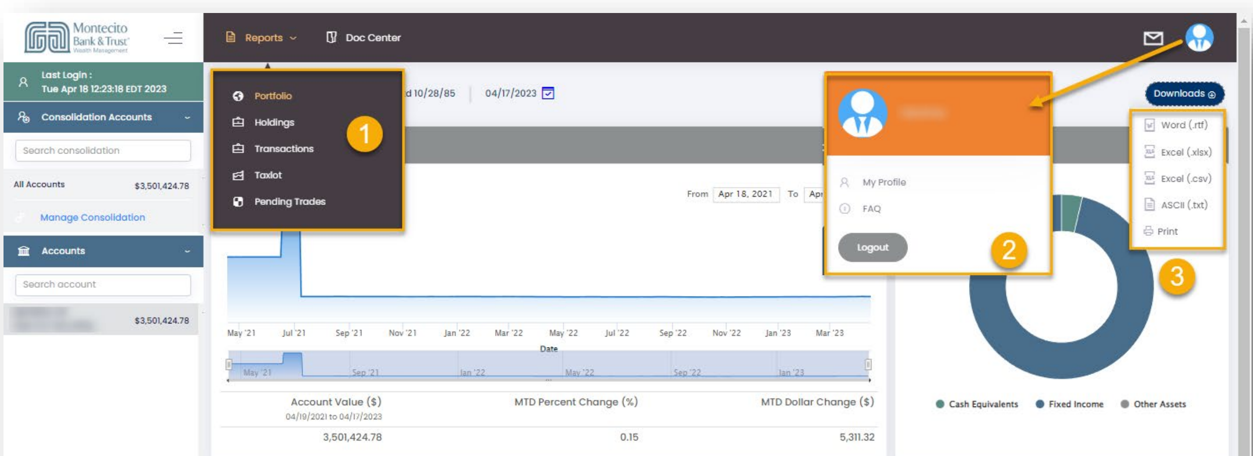
A new Accounts Panel allows you to switch your dashboard view from consolidation accounts to individual accounts. Simply click on the consolidation account or specific account to refresh the dashboard accordingly.



The panel can be minimized or expanded by clicking the icon in the top right of the Accounts Panel.

Navigation Options

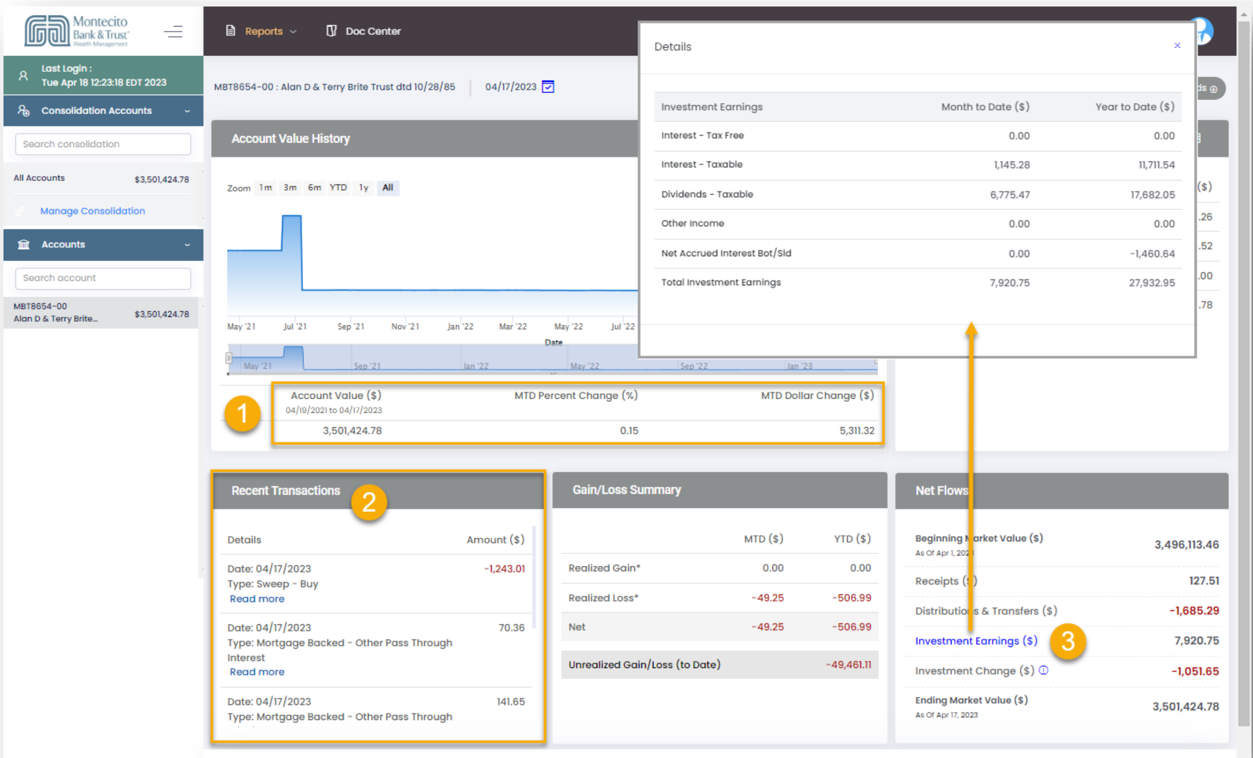
Quickly navigate between pages using the new navigation buttons at the top of the page. The links have been expanded below to show the underlaying options.



1. **Reports:** Dropdown allows you to navigate to the following pages: Portfolio, Holdings, Transactions, Taxlot, and Pending Trades.
2. **Profile:** Update your Login Information, Email and notification settings, Change Password, and Two Factor Authentication text and voice numbers.
3. **Download:** Print or download the dashboard information in various formats (Word, Excel, and ASCII)

New Dashboard Details

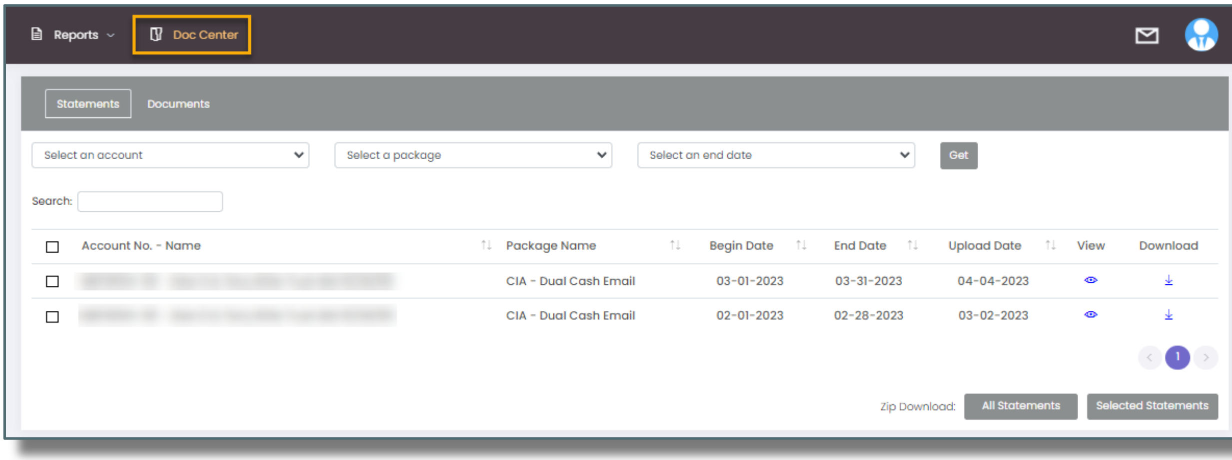
Additional dashboard details have been added as shown below.



1. **Account Value History:** Account Values, Percent Change, MTD Dollar Change appear below the chart.
2. **Recent Transactions:** Displays the last five transactions.
3. **Investment Earnings:** Clicking on Investment Earnings displays a pop-up screen with investment details.

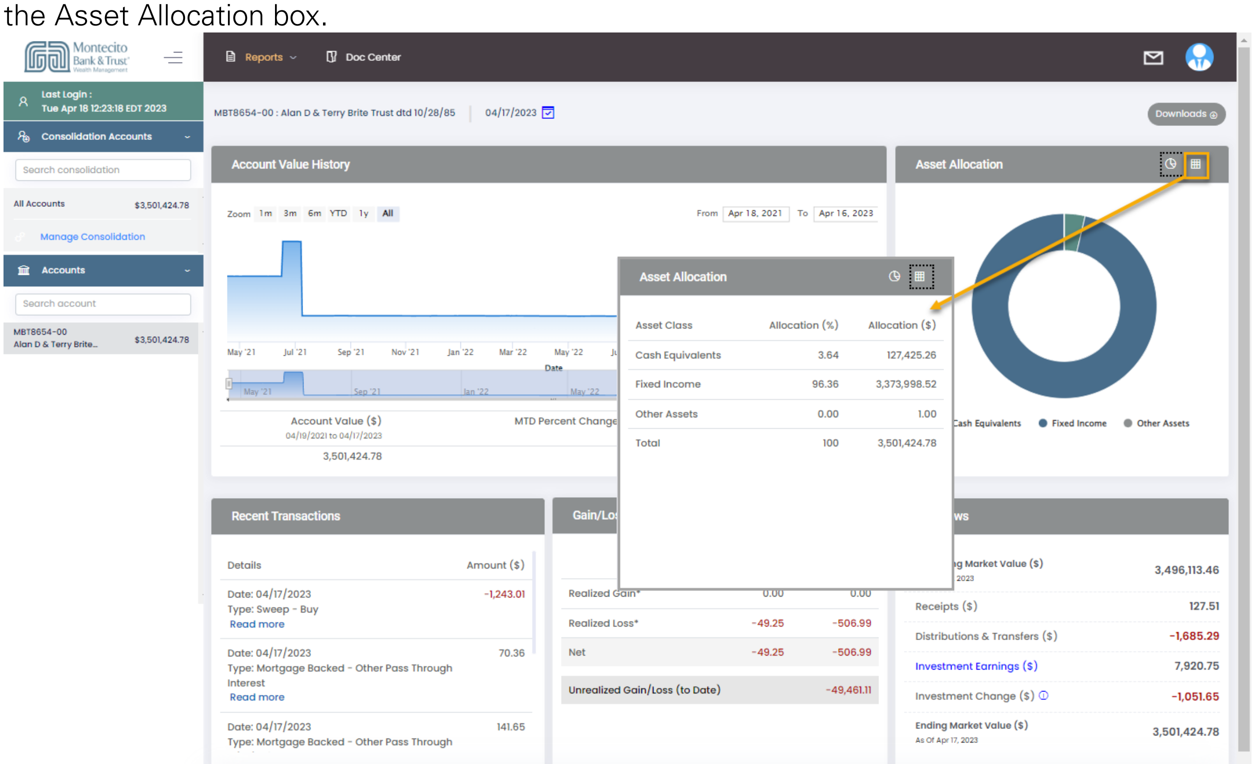
Document Center (Doc Center)

The Doc Center contains Statements and Documents and can be filtered by Account, Package, and End Date. Documents can be viewed or downloaded from this page.



Change Asset Allocation View

The Asset Allocation defaults to a doughnut chart; however, the view can be changed to display the allocation details. Change the view by clicking the table icon in the top right-hand corner of the Asset Allocation box.



Need additional support?

Please call Nevin Trampenau at **(805) 564-0281** for assistance.