TRI-STAR TRUST

A FRESH LOOK FOR YOUR ACCOUNTS

Your Tri-Star Trust online account portal has a refreshed design that makes it easier to see your full financial picture: your accounts, portfolio, and documents, all in one place. Your login stays the same, and the update comes to your firm's mobile app too

WHAT'S NEW

Simpler Dashboard
See your net worth and balances at a glance, with widgets you can arrange your way.

Fewer Clicks
Get to the information you need faster, with less scrolling and searching.

Document Vault
Find statements and documents faster with a new view that uses tabs instead of folders.

Outside Accounts
Add accounts you hold elsewhere right from the Accounts widget for a complete picture.

Faster Performance
Cleaner views put what matters up front, with quicker load times throughout.

Mobile App
The same refreshed experience comes to your firm's mobile app. Update when prompted.

WHAT STAYS THE SAME

- ✓ Your username and password
- ✓ Your accounts and documents
- ✓ Face ID and fingerprint login

QUESTIONS?

Contact your Relationship Manager by calling (989) 921-0010.

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YOUR NEW EXPERIENCE, IN THREE STEPS

Nothing new to set up. Just sign in and look around.

1. Go to Wealth Access

Open the mobile app and follow the prompt to update to the latest version.

2. Sign in as usual

Use your current username and password, or Face ID and fingerprint login on your phone.

3. Take a look around

Start on your dashboard, then open your Document Vault to see the new tabs.

FREQUENTLY ASKED QUESTIONS

Do I need a new username or password?
No. Sign in with the same username and password you use today.

Will Face ID and fingerprint login still work?
Yes. Biometric login on your phone works just as it does today.

Is my account information the same?
Yes. Your accounts, balances, history and documents are all there. Only the look and navigation have changed.

I can't find something I used before. Where did it go?
Everything you use today is still available. Some features were combined into a single view to save you clicks. Start from your dashboard, or contact us and we will point you to it.

Can I still add accounts I hold at other institutions?
Yes, and it is easier now. Use the Accounts widget on your dashboard to connect outside accounts.

Do I need to update the mobile app?
Yes. When your mobile app prompts you, follow the steps to update. You can also update it from the App Store or Google Play.

THE FIRST OF MANY IMPROVEMENTS

- ✓ This update is the first of several ways we are improving your experience.
- ✓ See your whole financial picture in one place and spend less time looking for it.

QUESTIONS?

Contact your Relationship Manager by calling (989) 921-0010.