WEALTH MANAGER SIGN IN GUIDE

WEALTH MANAGER

Logging In

Once you have been set up as a user by the Commerce Trust Technical Support staff, you are ready to log on and view your account(s). You will need the Customer ID and temporary password that was provided to you via email. Start now by going to www.commercetrustcompany.com or www.commercebank.com.

For www.commercetrustcompany.com click on Account Access on the upper right-hand corner



Click on the Log In button below the Wealth Manager Login





If you are accessing from www.commercebank.com enter your Customer ID provided to you via email in the upper left-hand box labeled Customer ID. Then click the Log In button.



Next, enter your temporary password from your email and click the Log In button.

The Private Bank @ commerce Trust	
Log in to Online Banking	and the second second
Customer ID: Activate Online Banking	The shares -
Forgot Your Customer ID?	
Password:	
Forgot Your Password?	
Remember me	
Take me to:	
My Default Page	
Log In	



The Enhanced Security Feature will send a one-time security code to the device that's on file.

2:02		 5G 🗩
< 24	74454 >	
	Text Message Today 2:00 PM	
Commerce E Your one-tim 196936. Dor Call <u>833-500</u> request it.	Bank Enhanced Securi ne security code is n't share it with anyon <u>9-3246</u> if you didn't	ity: e.
The	e sender is not in your conta	act list.

Report Junk

Enter your one-time code to finish logging in. Click "Resend Code" to generate a new one-time security code. You can find Frequently Asked Questions and other helpful resources HERE. If you continue to have problems, call our Customer Care Center at 833-509-3246.

The Private Bank @ commerce Trust	
Enhanced Security	200.0.0
Enter the one-time security code you received by text at ***.***.1647. It may take a few minutes to receive the code.	The state of the second
One-Time Code Resend Code	
If you are having trouble authenticating, please call our Customer Care Center at 833-509-3246 .	
Continue	
Cancel	



Changing your password

If you are required to change your password from the temporary password we provided to you. Enter a new password. Re-Enter your new password and click the Submit button.

	Commerce Bank
1	UPDATE on COVID-19: Branch lobby access at most locations is by appointment or as social distancing allows. Drive-thru service is available to handle most banking needs. Learn more
Cre	ate a new password.
New	/ Password
••	•••••
Shov	v Password Requirements
Con	firm New Password
••	•••••
	• • •
	Submit



Wealth Manager Sign In Guide

Online Banking Terms and Conditions

The Online Banking Terms and Conditions must be accepted before you are allowed to use our online products. In the event that you do not wish to read the document in full, it is available for you to revisit at any time at the following link: <u>https://www.commercebank.com/personal/digital-banking/online-banking-terms-and-conditions</u>.

Click the Accept button to continue.





Wealth Manager Sign In Guide

Online Banking Support Security Questions

If you need help logging into our system, you can call our Technical Support team. Our Technical Support team is required to validate your identity by asking security questions. This is to protect you from unauthorized persons making changes to your online access. On this page, fill in your birth date. Select two questions by clicking the down arrow next to the question. Fill in the answer to each question in the answer box below the question. Click on Update Answers to submit your security questions.

	Log In
Update Password Reset Questions and Answers	
What is your Date of Birth:	
Cancel Continue	



Wealth Manager Sign In Guide

Secure Authentication Enrollment

Secure Authentication Sign On is an extra layer of security the FFIEC requires financial institutions to provide for their online systems. It's a service that helps to protect you from fraudulent online activity. Click the Continue button to begin.

	Log In
Security Features	
Enhanced Security Program	
What is it? We use an enhanced security program that includes security questions which you select.	
How does it work? We also support extended validation authentication which adds another layer of protection by letting you know you're at our secure website. If you are using a high-security browser, such as Internet Explorer (IE7 and above), Firefox, etc., you can see that there is a closed padlock icon in the address bar of your browser, and the address bar has turned green.	
What are the next steps? Select and answer three security questions Choose to register your computer Confirm your settings	
Continue	

The Secure Authentication System requires its own security questions that are not accessible by employees of The Commerce Trust Company. Choose three questions by clicking on the drop-down arrow at the end of each question. Place the answer to each question in the box directly beneath the question.

These questions authenticate you and your computer as you log in to the system each time. If you check the "Yes" radio button under "Would you like us to remember this computer?", you will only be prompted with a security question the first time you log into the system. If you check "No", you will be prompted with one of the three questions each time you log in. Remember, if you delete the cookies in your browser, you will be prompted with a security question until you "remember" your computer again.

Click the Continue button to submit your security questions.



() Commerce Bank	
	Log In
<section-header><section-header><section-header><section-header><section-header></section-header></section-header></section-header></section-header></section-header>	Log In

Your Secure Authentication Enrollment is complete. Click the Continue button to view your Wealth Manager Financial Summary screen.





E-Sign Consent

This screen gives one the ability to Opt-in to receiving only electronic statements.

To receive only electronic statements, click the link that is titled 'View the E-Sign Authorization and Verification Passcode.' This link will open a PDF file that will include a Verification Passcode. Enter this passcode in the box next to 'Verification Passcode.' Once the code has been entered, and provided a valid current email address, click the button that says Accept.

To not Opt-in to electronic statements just click on the Decline button. If you are unsure which to choose, click on the Cancel button and this screen will show the next time you log into Wealth Manager. Once Accept or Decline has been chosen, the screen will not show when logging into Wealth Manager.

<form></form>	Е	-Sign Consent
<text><text><text><text><text><text></text></text></text></text></text></text>		
Evenuent Delayery Terms 4 Conditional You have two (2) options for the delivery of your periodic statement, by paper via U.S. Mall or by electronic delivery (1) you unget to receive your periodic statement or the documents enclosed with the paper statement, for you of your Trust Accounts viewed in Wealth Manager, I'you uselect the electronic delivery option, we will send an email reminder (to the email address you provided to your Trust Acministrator) notifying you when your statement be comes available to access through Wealth email endinders to unget the anal address of your periodic statement to comes available to access through Wealth email endinder to unget the wall address of your Account agreement, including your duly to promptly review such statements and endinders of your Account agreement, including your duly to promptly review such statements and endinders of your account agreement, including your duly to promptly review such statements and your and your and address remains your trust Administrator. Should delivery of the endinal endinder the apper copy of any statement by contacting your Trust Administrator and your any enguest a paper copy of any statement by contacting your Trust Administrator or statements will be paper statements. Lincloring any legal notices about your on your available to average your ystatement by contacting your Trust Administrator. Fees may apply for your sort any time and tecever paper statements will be delivered as an Addres [®] or staff. You will need access to a prove advecament apper copy diany statement by Reader (yresion 5 of higher) Trust Administrator. Fees may apply for your you wave application for Addres web is the You agree that you have the access to a prove advecament apper copy diany of a staff. You will need access to a prove any advecament apper copy diany of a staff. You will need access through Wealth Manager, and acknowledge that you have the necessary software to be advecament and conditi	Aı pa	uthorization is required for you to receive electronic statements only and discontinue receiving per statements. Please read the Terms and Conditions, then follow the Instructions below.
You have two (2) options for the delivery of your periodic statement by performed to delivery exclusively, type agaer statement is neaching your periodic statement of the documents analosed with the paper statement. If or any of your Trust Accounts viewed in Wealth Manager, at (you select the electronic delivery option), we will send an email reminder (to the email address you provided to your Trust Acdimistrator) enditing a validable to access through Wealth Manager, at you select the unsuccessful for whatever reasons it here with theses remains your provided to your or trust Administrator). Should delivery of the email address if our validable for access through Wealth Manager if the unsuccessful for whatever reasons. It nevertheless remains your proposibility to retrieve your periodic statements in a timely manner from commercebank com. Your statement (wild be your your Account agreement, including your duly to promyty review such statements and report any irregularities, shall apply to Existements. Each electronic statement, including any legal notices about your Account wild be provided electronically as part of your statement (such as change in terms); will remain available on infore (regiles. You may accele) your electronic delivery selection at any time and treecker paper statements via U.S. Mail by contacting your Trust Administrator. Changes may apply for paper copies. You may cancel your electronic delivery selection at any time and treecker paper statements will be doliver as an Adobe [®] Portable Document Format (PDF) file. To access and retain a PDF file, you need the free <i>Adoba Accounds</i> [®] Reader (version 5.5 or higher). You may accept here you was and chande you have the treeckers and chande the reader software application to view and save PDF file. You access your periodic statement on allowed field. Click Accept. Below, you consent to the electronic delivery selection statements and click access to sprinter or the ability to worite was a Adoble [®] Portable Document Format (PDF) file. To acces	E	Statement Delivery Terms & Conditions
You will need one of the following browsers to view electronic statements: Internet Explore* (version 7, 0 or higher), or the current version of Google Chrome*, Firefox* or Safar*, You will need access to a printer of the ability to download information if you wish to relate offile offile copies of statements. Your electronic statements will be delivered as an Adobe* Portable Document Format (PDF) file. To access and retain a PDF file, you need the free Adobe Acrobat* Packets and retain a PDF file, you need the free Adobe Acrobat* Peader (version 9.5 or higher). You may download the reader software application from Adobe's web site. You agree that you have the necessary software application to view and saxe PDF files. By clicking "Accept" below, you consent to the electronic delivery of periodic statements for all of your Trust Accounts viewed in Wealth Manager, and acknowledge that you have the necessary software to yoline Banking Terms and Conditions for additional information. Dy clicking "Accept" below, you consent to the clicking acknowledge that you have the necessary software to yoline Banking Terms and Conditions for additional information. Instructions To provide authorization, click the View the E-Sign Authorization link and obtain the Verification Passcode from the PDF. Return to this page and enter the Verification Passcode in the designated field. Click Accept Clicking Cancel defers this authorization until your next sign in. You will continue to receive this authorization und Verification Passcode. View the E-Sign Authorization and Verification Passcode. View the E-Sign Authorization and Verification Passcode. <td>Yele yo ele Tr Ac for en re yo wi ov CI re ty</td> <td>u have two (2) options for the delivery of your periodic statement, by paper via U.S. Mail or by schronic delivery. If you request to receive your periodic statement by electronic delivery exclusively, u understand and agree that you will not receive a paper statement, or the documents enclosed with a paper statement, for any of your Trust Accounts viewed in Wealth Manager. If you select the schronic delivery option, we will send an email reminder (to the email address you provided to your ust Administrator) notifying you when your statement becomes available to access through Wealth anager at commercebank com. You agree that you are responsible for maintaining a valid email dress and agree to notify us of any change in your email address. You can change the email address the statement reminder at any time by contacting your Trust Administrator. Should delivery of the nail reminder be unsuccessful for whatever reason, it nevertheless remains your responsibility to trive your periodic statements in a timely manner from commercebank com. Your statement will be sised to and available for rivewing on or about the same day each month. The terms and conditions of ur Account aprices, shall apply to E-statements. Each electronic statement (such as change in terms); It remain available online for eight (8) years. You may also print the statement schange to rous; ur Account which are provided electronically as part of your statement (your dato change in terms); It remain available online for eight (8) years. You may also print the statements or download to your wy system. You may request a paper coyo f any statement by contacting your Trust Administrator. harges may apply for paper copy fary statement by contacting your Trust Administrator. Harges may apply for paper copies. You may cancel your electronic delivery selection at any time and ceive paper statements.</td>	Yele yo ele Tr Ac for en re yo wi ov CI re ty	u have two (2) options for the delivery of your periodic statement, by paper via U.S. Mail or by schronic delivery. If you request to receive your periodic statement by electronic delivery exclusively, u understand and agree that you will not receive a paper statement, or the documents enclosed with a paper statement, for any of your Trust Accounts viewed in Wealth Manager. If you select the schronic delivery option, we will send an email reminder (to the email address you provided to your ust Administrator) notifying you when your statement becomes available to access through Wealth anager at commercebank com. You agree that you are responsible for maintaining a valid email dress and agree to notify us of any change in your email address. You can change the email address the statement reminder at any time by contacting your Trust Administrator. Should delivery of the nail reminder be unsuccessful for whatever reason, it nevertheless remains your responsibility to trive your periodic statements in a timely manner from commercebank com. Your statement will be sised to and available for rivewing on or about the same day each month. The terms and conditions of ur Account aprices, shall apply to E-statements. Each electronic statement (such as change in terms); It remain available online for eight (8) years. You may also print the statement schange to rous; ur Account which are provided electronically as part of your statement (your dato change in terms); It remain available online for eight (8) years. You may also print the statements or download to your wy system. You may request a paper coyo f any statement by contacting your Trust Administrator. harges may apply for paper copy fary statement by contacting your Trust Administrator. Harges may apply for paper copies. You may cancel your electronic delivery selection at any time and ceive paper statements.
Your electronic statements will be delivered as an Adobe [®] Portable Document Format (PDF) file. To access and retain a PDF file, you need the free Adobe Acrobal [®] Reader (version 9.5 or higher). You may download the reader software application from Adobe's web site. You agree that you have the necessary software application to view and save PDF files. By clicking 'Accept' below, you consent to the electronic delivery of periodic statements for all of your Trust Accounts viewed in Wealth Manager, and acknowledge that you have the necessary software to view and save PDF files which will allow you to access your periodic statement online. Please refer to the Opline Danking Terms and Conditions for additional information. Instructions To provide authorization, click the View the E-Sign Authorization link and obtain the Verification Passcode from the PDF. Return to this page and enter the Verification Passcode in the designated field. Click Accept Click Accept View the E-Sign Authorization until your next sign in, You will continue to receive this authorization until you either Accept or Decline this request. View the E-Sign Authorization and Verification Passcode. Verification Passcode:	Yo 7. pr	uu will need one of the following browsers to view electronic statements: Internet Explorer [®] (version 0 or higher), or the current version of Google Chrome [®] , Firefox [®] or Safari [®] , You will need access to a inter or the ability to download information if you wish to retain offline copies of statements.
By clicking "Accept" below, you consent to the electronic delivery of periodic statements for all of your Trust Accounts viewed in Wealth Manager, and acknowledge that you have the necessary software to Volume Danking Terms and Conditions for additional information. Instructions To provide authorization, click the View the E-Sign Authorization link and obtain the Verification Passcode from the PDF. Return to this page and enter the Verification Passcode in the designated field. Click Accept. Clicking Decline indicates your request to continue to receive paper statements. Clicking Cancel defers this authorization until your next sign in. You will continue to receive this authorization upon sign in until you either Accept or Decline this request. View the E-Sign Authorization and Verification Passcode. Verification Passcode: You must enter your email address when accepting the authorization. Email Address: Decline Cancel	Yo ac m ne	ur electronic statements will be delivered as an Adobe [®] Portable Document Format (PDF) file. To ccess and retain a PDF file, you need the free <u>Adobe Acrobal[®]</u> Reader (version 9.5 or higher). You ay download the reader software application from Adobe's web site. You agree that you have the ccessary software application to view and save PDF files.
Instructions To provide authorization, click the View the E-Sign Authorization link and obtain the Verification Passcode from the PDF. Return to this page and enter the Verification Passcode in the designated field. Click Accept Clicking Cancel defers this authorization until your next sign in, You will continue to receive this authorization upon sign in until you either Accept or Decline this request. View the E-Sign Authorization and Verification Passcode. Verification Passcode: You must enter your email address when accepting the authorization. Email Address: Accept Decline Cancel	By Tr vie	r clicking "Accept" below, you consent to the electronic delivery of periodic statements for all of your ust Accounts viewed in Wealth Manager, and acknowledge that you have the necessary software to aw and save PDF files which will allow you to access your periodic statement online. Please refer to the <u>nine Banking Terms and Conditions</u> for additional information.
To provide authorization, click the View the E-Sign Authorization link and obtain the Verification Passcode from the PDF. Return to this page and enter the Verification Passcode in the designated field. Click Accept Clicking Decline indicates your request to continue to receive paper statements. Clicking Dacline indicates your request to continue to receive paper statements. Clicking Cancel defers this authorization until your next sign in. You will continue to receive this authorization upon sign in until you either Accept or Decline this request. View the E-Sign Authorization and Verification Passcode. Verification Passcode: You must enter your email address when accepting the authorization. Email Address: Accept Decline Cancel	In	structions
Clicking Decline indicates your request to continue to receive paper statements. Clicking Cancel defers this authorization until your next sign in. You will continue to receive this authorization upon sign in until you either Accept or Decline this request. View the E-Sign Authorization and Verification Passcode. Verification Passcode: You must enter your email address when accepting the authorization. Email Address: Accept Decline Cancel	To Pa Ci	provide authorization, click the View the E-Sign Authorization link and obtain the Verification asscode from the PDF. Return to this page and enter the Verification Passcode in the designated field. ick Accept.
Clicking Cancel defers this authorization until your next sign in. You will continue to receive this authorization upon sign in until you either Accept or Decline this request. View the E-Sign Authorization and Verification Passcode. Verification Passcode: You must enter your email address when accepting the authorization. Email Address: Accept Decline Cancel	CI	icking Decline indicates your request to continue to receive paper statements.
View the E-Sign Authorization and Verification Passcode. Verification Passcode: You must enter your email address when accepting the authorization. Email Address: Accept Decline Cancel	CI au	icking Cancel defers this authorization until your next sign in. You will continue to receive this thorization upon sign in until you either Accept or Decline this request.
Verification Passcode: You must enter your email address when accepting the authorization. Email Address: Accept Decline Cancel	Vi	ew the E-Sign Authorization and Verification Passcode.
You must enter your email address when accepting the authorization. Email Address: Accept Decline Cancel	Ve	rification Passcode:
Accept Decline Cancel	v	T
Accept Decline Cancel	Er	nu must enter your email address when accepting the autorization.
		Accept Decline Cancel

Welcome to Wealth Manager!

You are now at your Dashboard Homepage screen. Here you will have access to several previews that provide information on your Trust accounts. Click on any of the previews to be linked directly to those sections in Wealth Manager where you can see detailed information.



On subsequent logins, start at <u>www.commercebank.com</u> and enter your Customer ID. Click on the Log In button. Next, enter your password and click on the Log In button. You will automatically be routed to your Financial Summary screen.

