

# eVANTAGE Information - General Information

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## What is eVANTAGE?

eVANTAGE is a client Portal Application that enables our clients to better manage their accounts and investments on-line. eVANTAGE is somewhat similar to online banking, but specific to Equity Trust Company and our processes.

eVANTAGE is free and available to all clients of Equity Trust Company. All you have to do is [enroll](#) into eVANTAGE to gain access to it.

## Overview

### What can eVANTAGE do (features)

- Online bill payment from the account - [Pay Bills] [Learn More](#)
- Check available cash balance and account balances [Portfolio Position]
- See the status of account Actions [Recent Activities] [Learn More](#)
- View Cash transactions and Positions [Cash Transactions] [Learn More](#)
- Create a DOI for Promissory Note, Real Estate, and Private Entity - [Make Investments]
- Sign-Up and access your quarterly statements on-line - [Electronic Statements (eStatements)] [Learn More](#)
- Ability to reset your password if you have forgotten your credentials - [Password Reset and Retrieve Username] [Learn More](#)
- Pay Annual Account Maintenance Fees Due to your account on-line - [Online Maintenance Fee Payment] [Learn More](#)
- Create and download a pre-filled Deposit Coupon for an asset in your account - [Online Deposit Coupon] [Learn More](#)
- Open an account Online:
  - Full & Partial Online Transfer-In Online ACH (recurring contributions)
  - Split Set-up fee from Funding Method and charge to Credit Card (when completing app wizard)
  - Online & Automatic Lexis Nexus Verification Online Gold Level Service Sign-up
  - Detailed itemized fee breakdown
  - Pre-filled generated online Transfer-in and ACH form Secured retrieval of generated PDF(s)
  - Clients can email themselves links to all online generated pre-filled forms

- Users can now open CESA accounts online

## Hours of operation

The only time that eVANTAGE is not available for use is between 1:00am and 3:00am EST nightly. During this time our systems are performing system maintenance and backups.

There are occasional short periods of time when eVANTAGE is unavailable. These down times occur well after business hours, and late into the night. These downtimes are used for incremental feature release to bring value to our customers using eVANTAGE.

## Who is eligible to enroll

All clients of Equity Trust are eligible to enroll into the eVANTAGE system. In order to enroll, he/she must know the account number and have a PIN (personal identification number) set for that account, as well as enter their Social Security Number. Visit the [Enrollment Guide](#) for a step-by-step guide on enrolling into eVANTAGE.

## When is the account active

You are able to enroll as soon as the account has been created by our Account Maintenance Team. Once the account has been logged into our system, you are immediately eligible to enroll into eVANTAGE.

## eVantage Enrollment Guide

Follow the instructions below to create your personal login credentials and access your account online today!

1. On the eVantage login page, click "Enroll Now" to create your User ID.

The screenshot shows the Equity Trust eVantage website. At the top, there is a navigation bar with links for "Open an Account", "Request Info", "About Us", and "Contact Us". Below this is a search bar with a "search" button. The main content area is divided into three sections. The left section is titled "myEQUITY" and lists benefits like "Quick and Easy Access to Your Accounts" and "Network with Like-Minded Investors and Industry Experts", with a "Join Today" button. The middle section is titled "Enroll Now in eVANTAGE" and contains the text: "Already have an Equity Trust account? Enroll in eVANTAGE for access to manage your account online, view the status of your investments, generate Direction of Investment forms, and more." Below this text is a red circle around the "Enroll Now" link and a link for "Need Help Enrolling?". The right section is titled "THE EQUITY TRUST eVANTAGE SYSTEM" and displays a message: "You have been successfully logged out of eVANTAGE." Below this is a login form with "Username" and "Password" input fields and a "Login" button. At the bottom of the login form, it says: "To Reset Password or Retrieve Username Click [here](#) eVANTAGE is not available between 1:00am and 3:00am EST."

2. Follow the directions below to verify your identity.


1. Enter your account number
2. Enter your 6-digit security PIN
3. Enter the Social Security Number with dashes
4. Click the Verify Information button

Please enter any of your Account numbers, the Personal Identification Number (PIN) for that Account, and your social security number (i.e. 000-00-0000) in the fields below.

 Due to recent system changes, some of Equity Trust Company accounts will now begin with a capital letter followed by six digits. Please refer to your quarterly account statement or account welcome letter to retrieve your account number.

If you have a Traditional, Roth, SEP, SIMPLE, HSA or CESA - Your account number may now begin with a capital "Z" followed by six numbers. If your original account number was less than six digits, zeroes "0" will now be added to the beginning of your account number following the "Z" in order to bring your account number to a total of six digits after the "Z". For example, if your account number originally contained only five numbers (ie: #12345), it will now begin with a "Z" then a "0" followed by your original account number. (IE: Z012345.)

If you have an Individual-K or a Roth Individual-K - Your account number may now begin with a capital "ZP" followed by six numbers. If your original account number was less than six digits, zeroes "0" will now be added to the beginning of your account number following the "ZP" in order to bring your account number to a total of six digits after the "ZP". For example, if your account number originally contained only five numbers (ie: #12345), it will now begin with a "ZP" then a "0" followed by your original account number. (IE: ZP012345.)

 To access The Equity Trust myEQUITY and eVANTAGE System, you must have an account with Equity Trust Company. If you recently submitted an application your online access will be granted once your account has been completely entered into our system.

Account Number:

\* PIN:

\* Social Security Number (i.e. 000-00-0000):

If you have trouble enrolling in myEQUITY / eVANTAGE or have questions regarding the service, please contact your **First Class Team**.

## 5. You will now be asked to create a User Name, Password, and select a Security Question

1. Create a User Name. (Your User Name must be unique as the system will not allow multiple individuals to have the same username.)
2. Create a Password (your password must be more than 6 characters and cannot contain ' or ")
3. Re-type your Password
4. Select a Security Question from three options
5. Enter the Answer to Your Security Question
6. If you would like to change your PIN, enter a new PIN number. PIN Numbers must be 6 digits and numeric.
7. Click the Enroll button

\* User Name:

\* Enter Password:

\* Re-enter Password:

\* Select a question we can use to confirm your identity:

\* Answer to Your Security Question:

New PIN (optional):

6. After clicking "Enroll", you will be taken to the Enrollment Confirmation page that contains a link to the eVANTAGE login page.

**Congratulations**, you have now successfully enrolled in eVANTAGE!

# For Your Security

Equity Trust is very concerned with the security of client information and has taken measures to ensure the security of our client portal application, The Equity Trust eVantage system. eVantage access uses Secure Socket Layer (SSL) technology, encrypting account information using 128-bit encryption, making the account data unintelligible to unauthorized individuals. SSL encryption is visible to clients when they see https:// in the address line of the web browser, and the security indicator of the web browser is displayed (Internet Explorer denotes a padlock image).

In addition to SSL technology, Equity Trust allows you to manage your user name and password. You can periodically change your user name and/or password information on-line at your convenience. To help ensure the security of your information, please be sure to not disclose your user name or password to anyone else.

## Browser Support

Equity Trust recommends Mozilla Firefox, or Internet Explorer with the latest security updates applied. Most web browsers should work as long as they support Secure Socket Layer (SSL), javascript, and strong, 128- bit encryption.

As of October 27, 2014, the following are the supported browsers:

- Internet Explorer Versions 7 or newer
- Safari Versions 5 or newer
- Firefox Versions 32 or newer
- Chrome Versions 37 or newer

If you're using an older browser version that is no longer compatible with eVantage you can go to the Mozilla or Microsoft web sites and download a new browser version.

Mozilla Firefox - <http://www.mozilla.org/>

Microsoft Internet Explorer - <http://www.microsoft.com/windows/ie/downloads/default.mspx>

# eVANTAGE - Online Bill Pay Walkthrough

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- [Pay Bill](#)
- [Online Bill Pay Introduction](#)
- [Step 1- Asset Information](#)
- [Step 2](#)
- [Step 3](#)
- [Download your Completed Bill Pay PDF](#)
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## Pay Bill

Click on **Pay Bill** from the menu on the left-hand side of the screen.

THE EQUITY TRUST
Registered Name: [REDACTED]  
Legal Address: [REDACTED]  
Primary Phone: [REDACTED]  
Email: [REDACTED]

[Choose Accounts](#) | [User Profile](#) | [Open a New Account](#) | [Contact Us](#) | [Client Forms](#) | [Help](#) | [Logout](#)

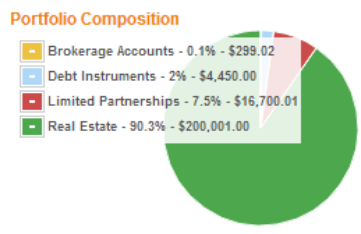
- Manage Account
- Make Investment
- Pay Bill
- Portfolio Positions
- Cash Transactions
- Recent Activities
- Electronic Statements
- Online Trading

Account Number: [REDACTED]

Name:	[REDACTED]	Cash Balance:	\$105.85
Account Type:	Traditional IRA	Uninvested Cash:	\$0.00
Account Open Date:	02/15/2012	Account Value:	\$221,554.88
<b>Available Cash Balance: \$105.85</b>			

[Generate Proof of Funds Letter](#)

**Portfolio Composition**



- Brokerage Accounts - 0.1% - \$298.02
- Debt Instruments - 2% - \$4,450.00
- Limited Partnerships - 7.5% - \$16,700.01
- Real Estate - 90.3% - \$200,001.00

## Online Bill Pay Introduction

This screen helps explain bill pays and what is needed to request a bill payment. Click **Proceed to Step 1**.

### Online Bill Pay

Account Cash Balance \$105.85

#### ▼ Intro

*This is a fast and convenient way to pay expenses related to your investment.*

Equity Trust Company will process your Bill Pay Direction of Investment automatically if the Bill Pay is for \$5,000.00 or less. However, if your Bill Pay is \$5,000.01 or over, you must download, sign and submit the Bill Pay PDF after completing the form on the next page.

#### What would I use a Bill Pay for?

All expenses associated with a current investment must be paid through a Bill Pay. Some examples include property improvement and repairs, HOA fees, insurance premiums or management fees. Online Bill Pays cannot be used to initiate a new investment, add on to current investments, take personal distributions, or education expenses. For educational expenses, please use the **Distribution Form** instead.

#### What do I need in order to complete this Online Bill Payment?

1. Investment that the payment refers to.
2. The correct name and address of who is receiving a payment from your account.
3. Available cash funds for this payment and any fees related to this request. You can find the balance of the cash in your account on the **Portfolio Positions** page.
4. Additional documents may be required such as invoice or purchase order.

#### Can I use a credit card to pay bills associated with my investment?

All expenses associated with an investment already owned in your retirement account must be paid from your IRA/401(k) account using a Bill Pay Direction of Investment form. Your retirement account cannot reimburse expenses paid by you or another disqualified person or entity from a separate funding source (such as credit cards, line of credit accounts, business lines, contractor credit accounts or any account of a similar nature) to maintain an investment owned by your account.



All expenses associated with your investment that require a Bill Pay to occur must be paid out of your IRA. Also, personally performing work on an investment property held within a retirement account may be construed as a prohibited transaction. [View more information about prohibited transactions.](#)

Cancel

Proceed to Step 1



## Step 1 – Asset Information

1. You will see the Account Cash Balance
2. Select the Investment the Bill Pay applies to
3. Enter the Amount of the Bill Pay
4. Click Proceed to Step 2

### Online Bill Pay

Account Cash Balance \$106.22 1

Intro

**Step 1: Asset Information**

**Select the asset for this bill pay.**  
Select the investment from the list below that this payment refers to. If you are unsure about the investment, please check your **Portfolio Positions** page.

\* Select an Asset:  2

\* What is the Amount of the Bill Pay?:  3

[Back to Intro](#) [Save for Later](#) [Cancel](#) [Proceed to Step 2](#) 4

## Step 2

1. Choose an existing payee from the dropdown or Create New Payee if adding a new one
2. Select if it is a new Recurring set up or a One Time Bill Pay.
  - a. If Recurring is chosen, the payment method defaults to Regular Check Regular Mail
3. Choose how the Bill Pay will be paid
  - a. Wire
  - b. Cashier's Check/Overnight
  - c. Regular Check/Overnight
  - d. Regular Check/Regular Mail
4. Choose if the Bill Pay will increase the value of the asset
5. Enter Payment Description
6. Enter Reference Information
7. Select Normal or Expedited processing
8. Proceed to Final Step

### ▼ Step 2: Payment/Processing Information

#### Payment Details

\* Who will be Receiving the Payment?:  1 [More Info](#)

\* Is this a Recurring Bill Pay?:  2 [More Info](#)

\* Will this Bill Pay increase the value of the Asset?:  3

\* How will this Bill Pay be Funded?:  4 [More Info](#)

Enter a description of payment and reference information below. A description of payment, such as "Roof Repairs" will help you identify the payment in the future and tells us what the Bill Pay is for. The Reference Information is any additional information such as an invoice number that will be sent with the payment.

\* Payment Description:  5

\* Reference Information:  6

#### Processing Information

\* How would you like this Transaction to be Processed?:  7 [More Info](#)

[Back to Step 1](#)

[Save for Later](#)

[Cancel](#)

[Proceed to Final Step](#) 8

### If funding by Wire:

#### Wire

[More info](#)

\* Bank Name:

\* ABA Routing Number:  [More info](#)

\* For Credit to (Bank Account Name):

\* Account Number :


For Further Credit to:

\* Bank Phone Number:

### If funding by Check:

#### Payee Detail

Provide the required information for your new payee.

 NOTE: Creation of new payees will be updated to your account once your Bill Pay has been processed.

\* Payee Name:

\* Address(No P.O. boxes for overnight delivery):

Address 2:

\* City:

\* State:

\* Zip Code:

Phone:

Fax:

If submitting a Recurring Bill Pay set up the Recurring Payment Schedule displays:

### Recurring Payment Schedule

[More info](#)

\* How often do you want to make a payment?:

\* Date of First Payment (MM-DD-YYYY)



Date of Final Payment (MM-DD-YYYY)



If fees are incurred they can be paid for via deduction of Cash Account or via Credit Card:

### Fee Payment Information

You have selected special processing options. Associated fees can be deducted from your cash account or paid via credit card.

\* How will Fees Associated with this Transaction be Paid?:

If Credit Card is selected:

### Pay Fees by Credit Card

[More info](#)

\* Cardholder's First Name:

\* Cardholder's Last Name:

\* Billing Address Line 1:

Billing Address Line 2:

\* Billing City:

\* Billing State:

\* Billing Zip Code:

\* Billing Phone:

\* Fees Charged:

\* Card Type:

\* Credit Card Number:


\* Security Code:

\* Expiration Month:

\* Expiration Year:

If Cash is selected:

**Fee Payment Verification**

 \$50.00 will be deducted from cash account upon submission

### Step 3

1. Click Review to review the information entered for the Bill Pay
2. Click Cancel to discard the transaction

**▼ Step 3: Finish**

**Click the review button below to proceed**

[Back to Step 2](#)

[Save for Later](#)

[Cancel](#)

[Review](#)

Summary page displays:


1. Check the Agreement check box and the Submit button will activate
2. Click the Submit button


## Bill Pay Summary


Take a few minutes to review what you've told us about your Bill Pay. If there are any errors, click the 'Go Back' button below and correct it. If you are satisfied that everything is accurate, click the 'Submit' button below and your Bill Pay Request will be submitted.


General Details	
Is this a recurring Bill Pay?	No
Will this increase value of your investment?	No
Processing Option:	Normal
Investment:	I0117540 - JANE DOE COMMERCIAL FUNDING
Bill Pay Amount:	\$1.00
Description of Payment:	Test
Reference Information:	Inv# Test-12345

Payee Details	
Payee Name:	ABC Lawn Care
Street Address:	PO Box 123
City:	Elyria
State:	OH
Zip Code:	44035
Funding Method:	Regular Check - Regular Mail

 If the bill pay has not yet been processed, it may be cancelled through eVANTAGE by going to **Recent Activities**.

 If your Bill Pay is \$5,000.00 or under, your request will be reviewed and processed based on the processing preference you have selected. If your Bill Pay is \$5,000.01 or over, please download the link on the next page, sign and submit to Equity Trust Company in order for your request to be reviewed and processed.

 You may send a signed copy by faxing it to 440-366-3751 or email to [help@trustetc.com](mailto:help@trustetc.com). Sending your signed copy by mail will delay the processing. Our company address is located on the PDF.

 **IMPORTANT:** By selecting 'Submit', you will have initiated a transaction at Equity Trust Company. We will review your bill pay based on your processing preference.

I AGREE

Cancel

Go Back

Submit

## Download your Completed Bill Pay PDF

From this screen the client can download a completed PDF of the Bill Pay request that they have just submitted. Again, if the bill pay was \$5,000 or less then nothing further is needed from the client. If over \$5,000 the client will need to sign the Bill Pay and fax this in before the bill will be paid.

### You're Almost Finished!

Your bill pay has been submitted to Equity Trust Company. We will review your Bill Pay based on your processing preference.

If your Bill Pay is \$5,000.00 or under, your request will be reviewed and processed based on the processing preference you have selected. If your Bill Pay is \$5,000.01 or over, please download the link on the next page, sign and submit to Equity Trust Company in order for your request to be reviewed and processed.

You may send a signed copy by faxing it to 440-366-3751 or email to [help@trustetc.com](mailto:help@trustetc.com). Sending your signed copy by mail will delay the processing. Our company address is located on the downloadable Bill Pay request form below.

Download your Bill Pay Request Form

[Return to Account Management](#)



**EQUITY**  
TRUST COMPANY<sup>®</sup>

#### Equity Trust Company

PO BOX 451340  
Westlake, OH 44145

**Phone:** 440-323-5491

**Fax:** 440-366-3751

## Bill Payment Direction of Investment

### Instructions

For Internal Use Only:			
Document	Activity #	Account #	Name:
Bill Pay DOI	AP1164778		

Equity Trust Company will process your Bill Pay Direction of Investment automatically if your bill payment is \$5000 or less. However, if your Bill Pay is \$5,000.01 or over follow these steps to complete your online bill payment:

- Carefully check your Bill Payment for errors.
- Sign and date the bottom of the Bill Payment Direction of Investment form.
- Fax the Bill Pay form to: 440-366-3751
- To check the status of your Bill Payment, check Recent Activities in eVANTAGE.

If you have any questions or concerns regarding your Direction of Investment, please contact your First Class Team at Equity Trust at 440-323-5491 .

Thank you for using the Equity Trust eVANTAGE System!

Account # Z125724

Activity # AP1164778

Fax to 440-366-3751

Bill Pay

05-08-2014 14:21:39 EDT

Equity Trust Company

Account Owner Name				Country United States of America
Street Address 225 Burns Road	City Elyria	County	State OH	Zip 44035
E-Mail Address		Home Phone 440-323-5491	Fax Number 440-366-1231	Cell Phone 440-522-9876

<b>Processing Instructions</b>				
You have selected <b>Normal</b> processing.				
Fees \$0.00	Fee Payment Method			
CC Billing Name		CC Billing Street Address		
CC Billing City	CC Billing State	CC Billing Zip	CC Billing Phone	
Credit Card#	Approval Code	Date		

<b>Payment Details</b>		
If a final payment date has not been set for a recurring payment, you must contact Equity Trust in writing when you wish to terminate payments.		
IRN I0117540	Increase Value of IRN? No	Is this a recurring payment? No
Bill Payment Method Regular Check - Regular Mail	Bill Amount \$1.00	Invoice or Reference# Inv# Test-12345
Description Test		
Initial Payment Date	Final Payment Date	Payment Frequency (M=Monthly/Q=Quarterly/A=Annual)

<b>Check Remittance Details</b>			<b>Wire Funds Details</b>	
Pay to the order of: ABC Lawn Care C/O:			Bank Name	
Street Address PO Box 123			Bank Phone Number	
City Elyria	State OH	Zip 44035	Account Number	ABA Routing Number
			For Credit To (Bank Account Name)	For Further Credit

**Disclosure and Signature**

**IMPORTANT. PLEASE READ BEFORE SIGNING.**

The undersigned IRA Owner acknowledges that this Payment Directive is being provided to the Custodian under the Individual Retirement Custodial Agreement in force between the parties and, therefore, the undersigned IRA Owner is subject to, and Custodian is protected by, the provisions set forth in such agreement and the underlying investment direction form relating to the IRA investment to which this Payment Directive pertains (including, without limitation, the indemnity hold harmless, release and defense provisions contained in such documents), which documents are incorporated herein by reference to the effect that, among other things, the Custodian is not responsible to do, or forbear from, any act the direction of which has not been actually received by the Custodian in a writing signed by the IRA Owner or other proper person (which direction may be by facsimile or other form acceptable to the Custodian and upon which it may rely so long as it believes such direction to be genuine and to be signed or presented by the IRA Owner or other proper person) within a sufficient period of time for such direction to be accomplished in accordance with the Custodian's normal business practices (without regard to whether Custodian has undertaken efforts to comply with such directive) and to the extent sufficient funds are available in the IRA account.

**Sign and Date**

Account Owner's Signature \_\_\_\_\_ Date \_\_\_\_\_ Account Custodian's Signature \_\_\_\_\_ Date \_\_\_\_\_

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# eVANTAGE - Cash Transactions

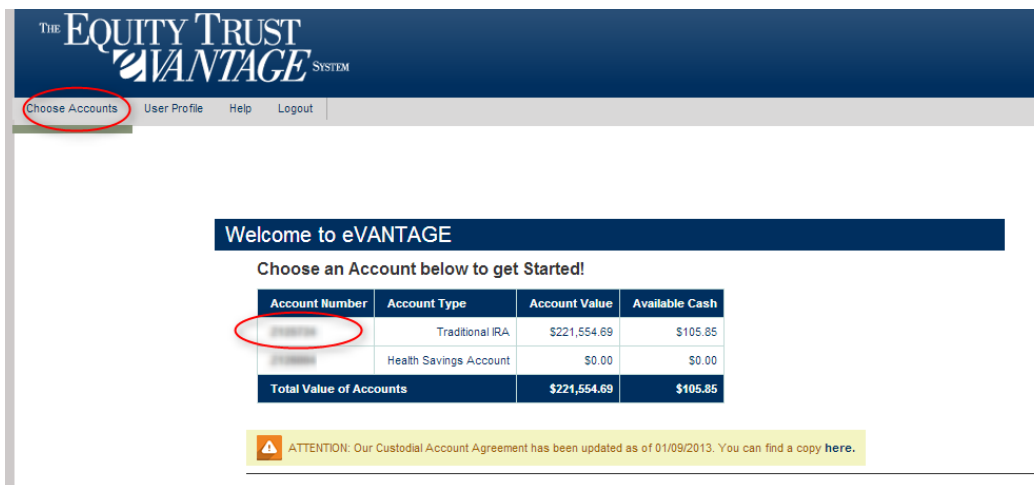
On this page:

- [eVANTAGE - Cash Transactions Viewing & Sorting Downloading](#)
- [Back to eVANTAGE - General Information](#)

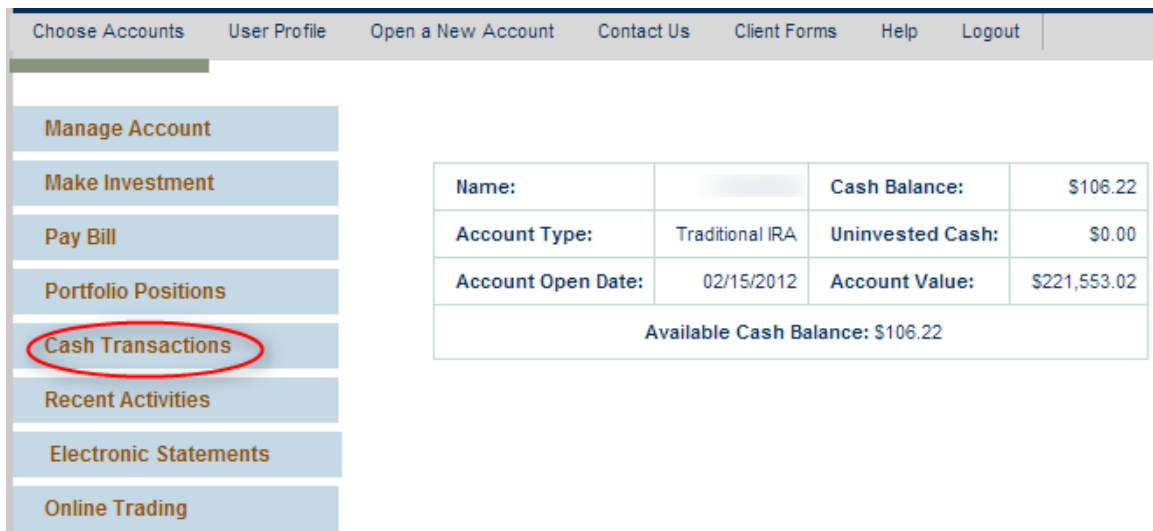
The client can see a list of all cash transactions for their account. The client may also download a comma delimited file (.csv) that can be imported into financial program that can import data from a .csv file.

## Viewing & Sorting

Log in to the system and choose the Account for which to view Cash Transactions.



Click on **Cash Transactions** from the menu on the left-hand side of the screen.



Clicking on the column header of each column will allow the client to sort the data in alphanumeric order by that column.

Cash Transactions

Name:		Cash Balance:	\$106.22
Account Type:	Traditional IRA	Uninvested Cash:	\$0.00
Account Value:	\$221,548.76	Available Cash Balance:	\$106.22

[Download Your Cash Transactions](#)

Clicking the Column Header will sort the data displayed in alphanumeric order by that column

Trans Date	Trans Posted Date	Trans Description	IRN	Trans Amt	Payee Info	Withholding
05/06/2014	05/06/2014	COR Funds Received -- EFT DEPOSIT	076719 - COR CLEARING LLC BROKERAGE	\$0.37	N/A	
04/30/2014	04/30/2014	INTEREST EARNED		\$0.00	N/A	
03/31/2014	03/31/2014	INTEREST EARNED		\$0.00	N/A	
03/17/2014	03/17/2014	ETC Reimbursement of Fee		\$105.85	N/A	
03/15/2014	03/15/2014	SERVICE PAID - A/R -- Equity Trust - Ohio		- \$105.85	N/A	
03/05/2014	03/05/2014	COR Funds Received -- EFT DEPOSIT	076719 - COR CLEARING LLC BROKERAGE	\$1.38	N/A	
03/05/2014	03/05/2014	EXPENSE PAID -- void check #1788296/EQUITY ENTERPRISES	10117541 - EQUITY ENTERPRISES	\$1.00	EQUITY ENTERPRISES 20 GREAT OAKS BLVD. #230 SAN JOSE, CA, 95119	
03/04/2014	03/04/2014	COR Funds Received -- EFT DEPOSIT	076719 - COR CLEARING LLC BROKERAGE	\$0.01	N/A	

## Downloading

To **Download** the data into a .csv file click the 'Download Your Cash Transaction' link on the top of the data table.

The client will need to read and agree to the Disclaimer language and click the Agree button.

Agreement ✕

The documents available on eVANTAGE are provided for your personal use only and may not be retransmitted or redistributed without written permission from Equity Trust Company. You may not upload any of this site's material to any public server, on-line service, network, or bulletin board without prior written permission from Equity Trust Company. You may not make copies for any commercial purpose. Equity Trust Company is providing this data "as is, and cannot be liable for any un-authorized modification of this downloaded file and data contained within it, by you, your agent or any third-party individuals for any purpose. All files have been virus scanned, however, for your own protection; you should scan these files again.

Clicking **AGREE** button below opens browser window to download Cash Transactions

Disagree
Agree

Client's web browser will ask the client to save a .csv file to their computer. The client has the ability to rename the file and decide where they want to save it.

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# eVANTAGE - Pre-Filled Deposit Coupons

On this page:

[eVANTAGE - Pre-Filled Deposit Coupons](#)

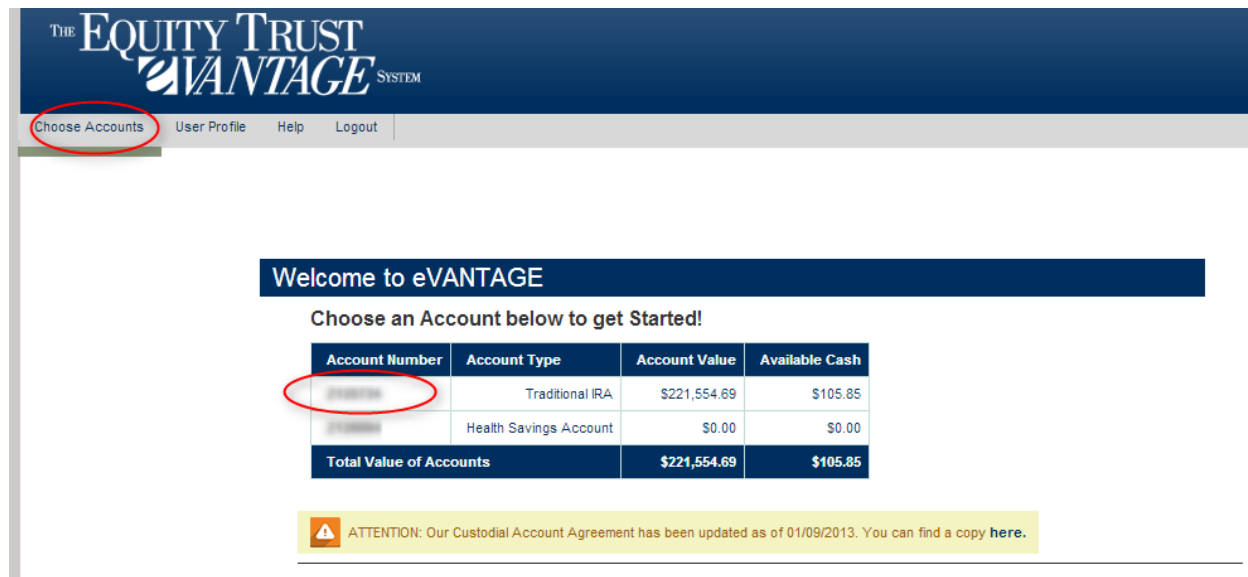
[Deposit Coupons](#)

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Print pre-filled Deposit Coupons - Create PDF's for deposit coupons for asset payments.

## Deposit Coupons

Log in to the system and choose the Account from which to generate Deposit Coupon.



The screenshot displays the eVANTAGE system interface. At the top, the logo for 'THE EQUITY TRUST eVANTAGE SYSTEM' is visible. Below the logo is a navigation menu with the following items: 'Choose Accounts' (circled in red), 'User Profile', 'Help', and 'Logout'. The main content area features a dark blue header that reads 'Welcome to eVANTAGE'. Below this header is a section titled 'Choose an Account below to get Started!' which contains a table of account information. The table has four columns: 'Account Number', 'Account Type', 'Account Value', and 'Available Cash'. The first row shows a 'Traditional IRA' with an account value of \$221,554.69 and available cash of \$105.85. The second row shows a 'Health Savings Account' with an account value of \$0.00 and available cash of \$0.00. A summary row at the bottom of the table indicates a 'Total Value of Accounts' of \$221,554.69 and 'Available Cash' of \$105.85. Below the table is a yellow warning box with a triangle icon and the text: 'ATTENTION: Our Custodial Account Agreement has been updated as of 01/09/2013. You can find a copy [here](#).'

Account Number	Account Type	Account Value	Available Cash
	Traditional IRA	\$221,554.69	\$105.85
	Health Savings Account	\$0.00	\$0.00
<b>Total Value of Accounts</b>		<b>\$221,554.69</b>	<b>\$105.85</b>

**ATTENTION:** Our Custodial Account Agreement has been updated as of 01/09/2013. You can find a copy [here](#).

On the Portfolio Positions page of eVantage you'll notice a little icon that looks like a coupon. This will allow clients to print a bar-coded deposit coupon for that IRN. For Instance, if I was going to deposit a rent check for IRN I0117540, I would click the icon next to that IRN.

The screenshot shows the eVantage website interface. At the top, the logo for 'THE EQUITY TRUST VANTAGE SYSTEM' is displayed. To the right, user information is shown: Registered Name, Legal Address (225 Burns Road, Elyria, OH 44035 - 1512), Primary Phone, and Email. A navigation menu includes 'Choose Accounts', 'User Profile', 'Open a New Account', 'Contact Us', 'Client Forms', 'Help', and 'Logout'. Below the navigation, a sidebar on the left contains menu items: 'Manage Account', 'Make Investment', 'Pay Bill', 'Portfolio Positions', 'Cash Transactions', 'Recent Activities', 'Electronic Statements', and 'Online Trading'. The main content area displays account details for a Traditional IRA, including Name, Cash Balance (\$105.85), Account Type, Uninvested Cash (\$0.00), and Account Open Date (02/15/2012). A 'Generate Proof of Funds Letter' button is present. Below this is a 'Portfolio Composition' pie chart showing: Brokerage Accounts (0.1% - \$298.83), Debt Instruments (2% - \$4,450.00), Limited Partnerships (7.5% - \$16,700.01), and Real Estate (90.3% - \$200,001.00). The 'Account Beneficiaries' section shows 'Test Bene 1' as the primary beneficiary (100.0%). A 'Portfolio Positions' table lists IRNs, including 076719 (COR CLEARING LLC BROKERAGE) and I0117540 (JANE DOE COMMERCIAL FUNDING), with a coupon icon circled next to the latter. A 'GOLD Level Member' badge and 'Direct Service Number' are also visible.

On the next Screen, fill in the amount of the deposit and click Review.

The screenshot shows the 'Payment Coupon Generator' screen on the eVantage website. The header and navigation menu are identical to the previous screenshot. The main content area features a dark blue header for 'Payment Coupon Generator'. Below this, a welcome message states: 'Welcome to the automated payment coupon generator. Completion of this form will create a PDF that will be a payment coupon for the IRN (Investment) that you have selected. Print the PDF and remit this coupon with payments or deposits for your investments. If you have not chosen the correct IRN, please press 'Cancel' and select the icon next the correct IRN.' A prompt asks the user to 'Enter the amount of the deposit that you would like to appear on the coupon and press the 'Review' button to continue.' A text input field labeled 'Amount \$:' contains the value '1.00'. At the bottom, there are two buttons: 'Cancel' and 'Review'.

The confirmation page appears. If all is correct, click Submit.

**THE EQUITY TRUST eVANTAGE SYSTEM**

Choose Accounts | User Profile | Open a New Account | Contact Us | Client Forms | Help | Logout

**Equity Trust Company Payment Coupon**

General Details	
Name on IRA Account	[REDACTED]
Account Number	[REDACTED]
IRN	076719
Investment Description	COR CLEARING LLC BROKERAGE
Investment Titling	Equity Trust Company Custodian FBO [REDACTED]
Amount	\$1.00

Cancel **Submit**

*Improve your investment*

Click the Download link to get the PDF of the coupons.

<b>EQUITY TRUST COMPANY Payment Coupon</b>		IRN Description: COR CLEARING LLC BROKERAGE
FBO IRA Name: [REDACTED]		
IRA Account: [REDACTED]		
Investment Reference: 076719		
* Payment Amount: \$1.00		
* If new payment amount is different from the amount listed above, enter correct amount here: \$		<b>SUBMISSION OPTIONS</b> BY FAX: 440-366-3751    BY EMAIL: help@trustetc.com  Overnight: Equity Trust Company, 1 Equity Way, Westlake, OH 44145 Regular Mail: Equity Trust Company, P.O. Box 45290, Westlake, OH 44145
For IRA Owner or Loan Servicer: \$ New Ending Investment Balance:		
Submit proceed from partial or full sale with completed Sale Direction of Investment Form and this payment coupon.		
Make Checks Payable to: Equity Trust Company Custodian FBO [REDACTED], Account Number: [REDACTED]		

The PDF will contain 3 coupons for that investment. The client may print off as many copies of this as they wish or simply come back to eVantage to print out more coupons.

Coupons can be created for Unsettled Assets.

## Back to eVANTAGE - General Information

Click [here](#) to go back to eVantage - General Information

# eVANTAGE - Client Access to eStatements

On this page:

- [eVANTAGE - Client Access to eStatements](#)
- [Email Notification to the client](#)
- [Instructions on locating eStatements through eVantage](#)
- [Back to eVANTAGE - General Information](#)

Keep in mind the client will only have access to their statements if they *enrolled* in eStatements BEFORE the most recent statement went out.

Example: If we are in the 3<sup>rd</sup> quarter and the client enrolled before the end of the 2<sup>nd</sup> quarter then they will have access, however if they did not enroll until after the 2<sup>nd</sup> quarter then they will not have access until after the end of this quarter when the 3<sup>rd</sup> quarter statements go out.

Once the statements go out and are made accessible in eVantage the client will receive an email notifying them that the statement has been made available.

## [How to Enroll into eStatements](#)

## Email Notification to the client

Many of our clients think that their Statements are emailed to them for viewing but this is not the case. When the statement becomes available, an email notification is sent to the email address that the client used when they signed up for electronic statements, but this email notification simply lets them know that the statement is available and provides a link to log into eVantage.

The email will come from [help@trustetc.com](mailto:help@trustetc.com)

## Instructions on locating eStatements through eVantage

1. The client needs to log into their eVantage account and select the account number in which they would like to view their statements.

The screenshot shows the eVANTAGE SYSTEM interface. At the top, there is a navigation bar with the following links: [Choose Accounts](#) (circled in red), [User Profile](#), [Help](#), and [Logout](#). Below the navigation bar, a dark blue banner reads "Welcome to eVANTAGE". Underneath, a section titled "Choose an Account below to get Started!" contains a table with the following data:

Account Number	Account Type	Account Value	Available Cash
123456789	Traditional IRA	\$221,554.69	\$105.85
987654321	Health Savings Account	\$0.00	\$0.00
<b>Total Value of Accounts</b>		<b>\$221,554.69</b>	<b>\$105.85</b>

The first account number in the table is circled in red. Below the table, a yellow banner with a warning icon contains the text: "ATTENTION: Our Custodial Account Agreement has been updated as of 01/09/2013. You can find a copy [here](#)."

- Next, the client selects the Electronic Statements option (as seen below) - if the client does not see this option then more than likely they are not enrolled in eStatements. The Client can confirm their enrollment status through Sign-up for Electronic Statements page on eVANTAGE that reports their current status. For instructions on doing so, please see [Enrolling into eStatements](#).

The screenshot shows a navigation menu on the left with the following options: Manage Account, Make Investment, Pay Bill, Portfolio Positions, Cash Transactions, Recent Activities, **Electronic Statements** (circled in red), and Online Trading. To the right, a table displays account information:

Name:		Cash Balance:	\$106.22
Account Type:	Traditional IRA	Uninvested Cash:	\$0.00
Account Open Date:	02/15/2012	Account Value:	\$221,548.76
Available Cash Balance: \$106.22			

- Once a client selects Electronic Statements a new page will be generated with access to their electronic statements. The client selects the quarter in which they would like to see their statement through the dropdown box as seen below. Typically the client will be able to view up to 5 of the most recent statements.

The screenshot shows a browser window with the URL [https://www.cos8twiz.com/content\\_page.asp](https://www.cos8twiz.com/content_page.asp). The page header includes the EQUITY TRUST COMPANY logo and navigation links: eStatements for, Close Window, eStatement Home, and Archive. The main content area is titled "eStatement Quick View" and features a dropdown menu labeled "Please Select" (circled in red). Below the dropdown is a "Welcome" section with instructions on how to view eStatements. A "User Menu" sidebar on the right contains links for Navigation, eStatement Home, eStatement Archive, Contact Page, Help Center, User Guide, Adobe Acrobat, Web Browsers, and F.A.Q. A red banner at the bottom of the main content area reads "Important Address Change and Billing Information Included in Statement".

The eStatement System is provided as a service of Equity Trust Company. This is a private computing system. Use of this system is restricted to authorized users. Unauthorized access or use is not permitted and may constitute a crime punishable by law. The Web Statements System requires the use of a browser, that supports Adobe Acrobat Reader, JavaScript, Cookies, and Secure Sockets Layer (SSL).

Contact Equity Trust Company Phone: (888) 382-4727 Email: [help@trustetc.com](mailto:help@trustetc.com)



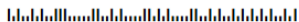
4. Now that the client has selected a quarter, a popup window will open which will generate



1 Equity Way  
Westlake OH 44145

Return Service Requested

**Quarterly Statement**  
Statement Period 01/01/14 thru 03/31/14  
Page 1 of 6



225 BURNS RD  
ELYRIA OH 44035-1512

Customer Service and Account Information

**Customer Service**  
Help@TrustETC.com

**Website**  
www.TrustETC.com

**Summary of Equity Trust Accounts**

Account Type	Account Number	Value as of quarter end
Traditional IRA		\$221,550.45

[Back to eVANTAGE - General Information](#)

Click [here](#) to go back to eVantage - General Information

# eVANTAGE - Enrolling into Electronic Statements (eStatements)

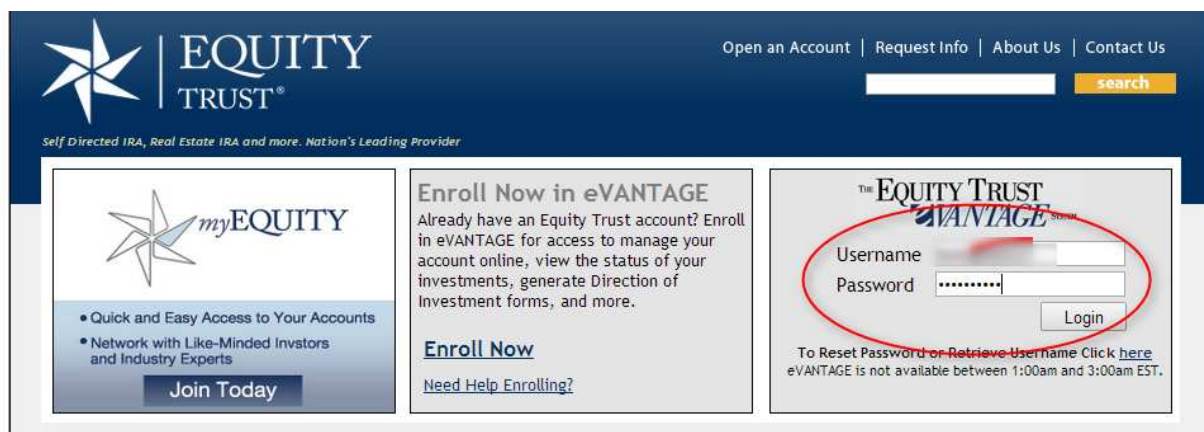
On this page:

- [eVANTAGE - Enrolling into Electronic Statements \(eStatements\)](#)
- [Enrolling in eStatements](#)
- [Email Confirmation](#)
- [Client opts IN for eStatements:](#)
- [Opts OUT of eStatements for Paper Statements:](#)
- [Back to eVANTAGE - General Information](#)

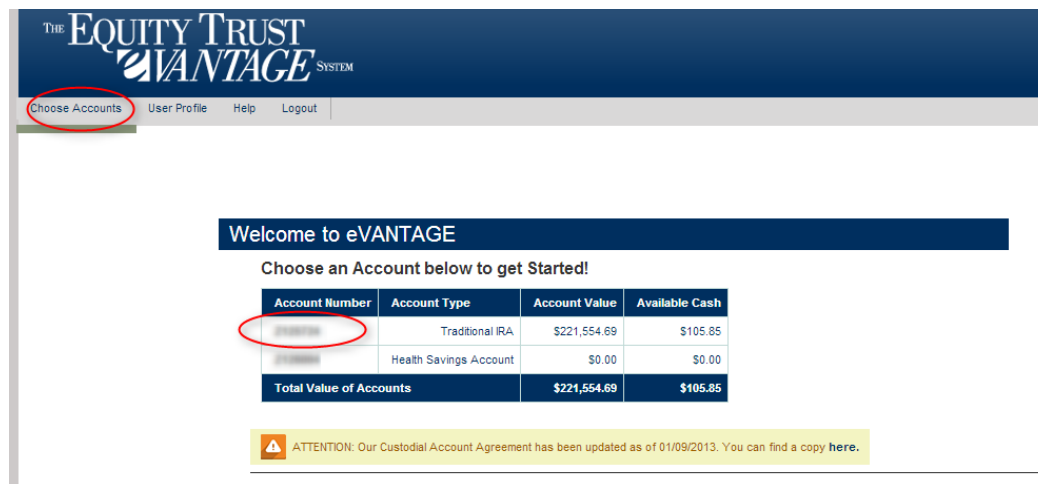
This article can also be referenced in the event that you choose to opt out of eStatements and instead receive Paper Statements.

## Enrolling in eStatements

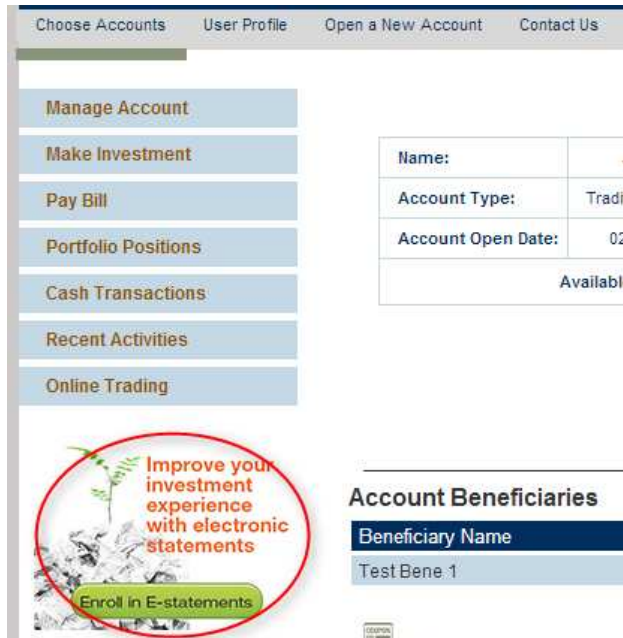
1. You login to eVantage by using [eVANTAGE login page](#) inputting their Username and Password. If you have never enrolled in eVantage, you will need to enroll into eVANTAGE.



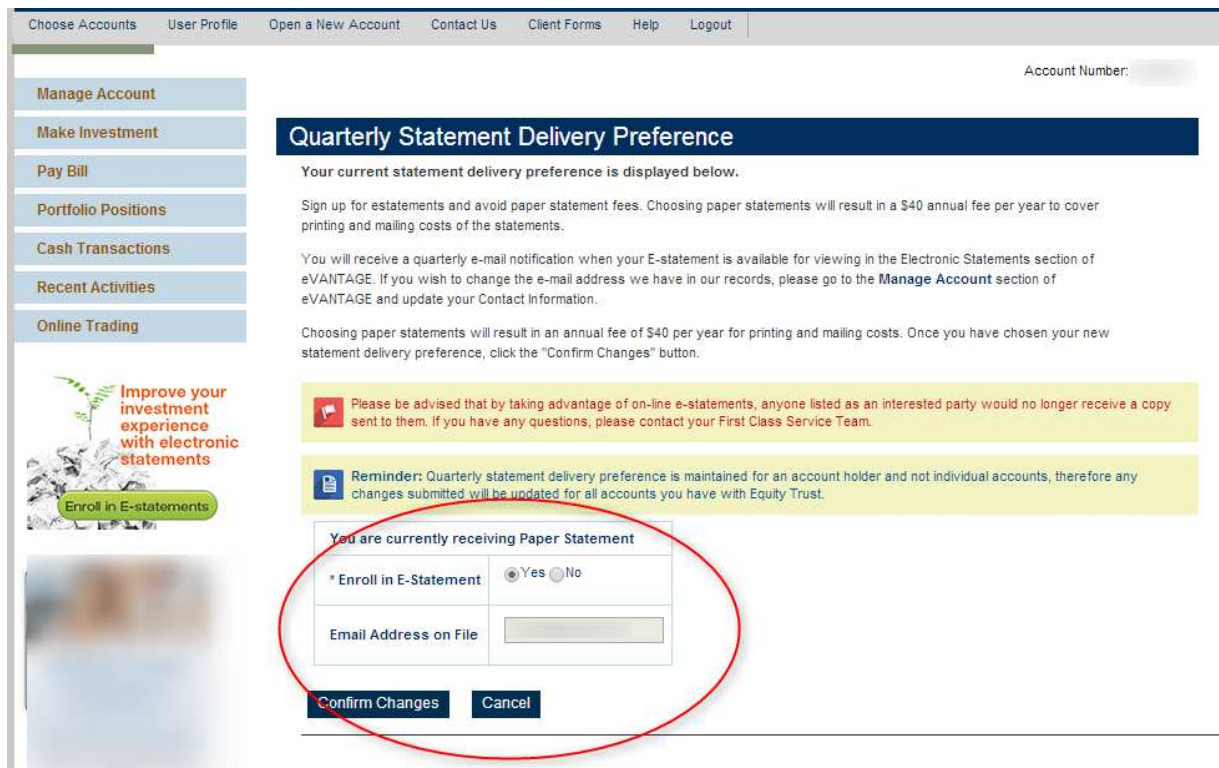
2. Once you have logged in you will choose an account



### 3. Click on the option to enroll in eStatements



4. Next, select to enroll into **E-Statement** if they are currently are receiving Paper Statement (OR enroll into Paper Statement if they are currently receiving E-Statements) and click the "Confirm Changes" button. An action will be created in our processing system to modify their enrollment request. eVANTAGE will know what you current method of receiving your statements and provide the right option available to you.



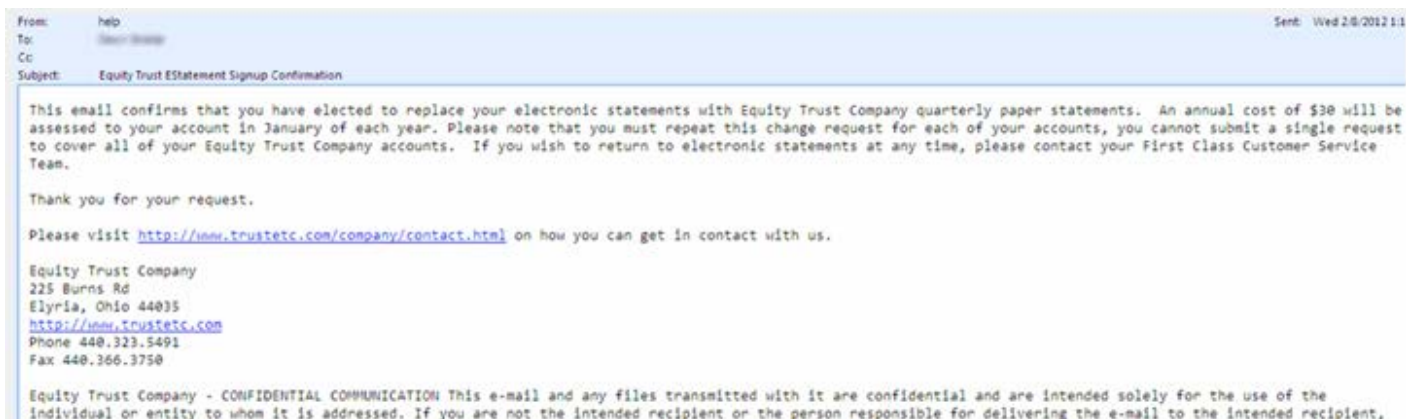
## Email Confirmation

See the screenshot below for an example of the email that you receive:

Client opts IN for eStatements:



Opts OUT of eStatements for Paper Statements:



[Back to eVANTAGE - General Information](#)

Click [here](#) to go back to eVantage - General Information

# eVANTAGE - Online Maintenance Fee Payment

On this page:

- [eVANTAGE - Online Maintenance Fee Payment](#)
- [Paying Yearly Maintenance fees](#)
- [Back to eVANTAGE - General Information](#)

## Paying Yearly Maintenance fees

Log in to the system and choose the Account for which to pay Maintenance Fee.

**THE EQUITY TRUST eVANTAGE SYSTEM**

Choose Accounts User Profile Help Logout

Welcome to eVANTAGE

Choose an Account below to get Started!

Account Number	Account Type	Account Value	Available Cash
123456789	Traditional IRA	\$221,554.69	\$105.85
987654321	Health Savings Account	\$0.00	\$0.00
<b>Total Value of Accounts</b>		<b>\$221,554.69</b>	<b>\$105.85</b>

ATTENTION: Our Custodial Account Agreement has been updated as of 01/09/2013. You can find a copy [here](#).

On the Portfolio Positions Page a notice will alert the client that they have fees due. The sentence is a link that says Your Annual Maintenance fees are due. Click here to pay now. This will allow clients to pay their fees online with either a credit card or deduct from their cash account.

https://evantage.trustetc.com/evantage/banking/initPortfolioPositions.action

**THE EQUITY TRUST eVANTAGE SYSTEM**

Registered Name  
Legal Address: 225 Burns Road  
Elyria, OH 44035 - 1512  
Primary Phone: 440-323-5491  
Email:

Choose Accounts User Profile Open a New Account Contact Us Client Forms Help Logout

Account Number

Manage Account  
Make Investment  
Pay Bill  
Portfolio Positions  
Cash Transactions  
Recent Activities  
Online Trading

Name:		Cash Balance:	\$106.22
Account Type:	Traditional IRA	Uninvested Cash:	\$0.00
Account Open Date:	02/15/2012	Account Value:	\$221,554.58

Available Cash Balance: \$106.21

Generate Proof of Funds Letter

Portfolio Composition

- Brokerage Accounts - 0.1% - \$298.35
- Debt Instruments - 2% - \$4,450.00
- Limited Partnerships - 7.5% - \$16,700.01
- Real Estate - 90.3% - \$200,001.00

Improve your investment experience with electronic statements  
Enroll in E-statements

Account Beneficiaries

Your Annual Maintenance Fees are due. Click here to pay now. If you have submitted your payment for your due annual maintenance fees within the last 48 hours, please disregard the above message. If you have any questions, please contact your First Class Team. Click here to pay now.

Choose method of payment:

## Online Annual Maintenance Fee Payment

According to our records, you currently have annual maintenance fees due on account [REDACTED]



**The total fees due amount is: \$265.00** Please select one of the payment methods below to pay your annual maintenance fees due.

Note: If you have submitted your payment for your due annual maintenance fees within the last 48 hours, please disregard the above message. If you have any questions, please contact your First Class Team.

\* Choose Method of Payment:

Cancel

If paid by Cash Account:

## Online Annual Maintenance Fee Payment

According to our records, you currently have annual maintenance fees due on account [REDACTED]



**The total fees due amount is: \$195.00** Please select one of the payment methods below to pay your annual maintenance fees due.

Note: If you have submitted your payment for your due annual maintenance fees within the last 48 hours, please disregard the above message. If you have any questions, please contact your First Class Team.

\* Choose Method of Payment:

**i** \$195.00 will be deducted out of cash account for the payment of your account annual maintenance fees.

Cancel

Confirm Payment

If paid by Credit Card:

## Online Annual Maintenance Fee Payment

According to our records, you currently have annual maintenance fees due on account [REDACTED]



The total fees due amount is: **\$265.00** Please select one of the payment methods below to pay your annual maintenance fees due.

Note: If you have submitted your payment for your due annual maintenance fees within the last 48 hours, please disregard the above message. If you have any questions, please contact your First Class Team.

\* Choose Method of Payment:



\$265.00 will be charged to your credit card

### Credit Card Information

CardHolder's First Name	<input type="text"/>
CardHolder's Last Name	<input type="text"/>
Billing Address Line 1	<input type="text" value="225 Burns Road"/>
Billing Address Line 2	<input type="text"/>
Billing City	<input type="text" value="Elyria"/>
Billing State	<input type="text" value="OH"/>
Billing Zip Code	<input type="text" value="44035"/>
Billing Phone	<input type="text" value="440-323-5491"/>
Credit Card Type	<input type="text" value="Select"/>
Credit Card Number:	<input type="text"/>
Credit Card Security Code:	<input type="text"/>
Expiration Month:	<input type="text" value="Select"/>
Expiration Year:	<input type="text" value="Select"/>

Cancel

Confirm Payment

After clicking the Confirm Payment:

Online Annual Maintenance Fee Payment Summary	
General Details	
Total Fees:	\$265.00
Payment Type:	Credit Card
First Name:	
Last Name:	
Credit Card Billing Address:	225 Burns Road Elyria OH 44035
Total Charges	\$265.00
Card Type:	Visa
Expiration Date:	01/2015

[Go Back](#)[Cancel](#)[Submit](#)

Click Submit, the Confirmation page will display.

## Back to eVANTAGE - General Information

Click [here](#) to go back to eVantage - General Information



# eVANTAGE - Password Reset and Retrieve Username

On this page:

- [eVANTAGE - Password Reset and Retrieve Username Step 1](#)
- [Step 2](#)
- [Back to eVANTAGE - General Information](#)

eVantage clients will now have the ability to reset their own passwords and not be required to contact CST to do so.

## Step 1

From [eVANTAGE login screen](#), click the word *here* which is a link to Step One of the Password Reset, UserName Retrieval Screen.

The screenshot shows the Equity Trust website header with navigation links: "Open an Account | Request Info | About Us | Contact Us" and a search bar. Below the header, there are three main content areas:


- myEQUITY**: Promotes quick access to accounts and networking with experts. Includes a "Join Today" button.
- Enroll Now in eVANTAGE**: Encourages enrollment for account management. Includes an "Enroll Now" link and a "Need Help Enrolling?" link.
- The EQUITY TRUST eVANTAGE**: Login section with "Username" and "Password" input fields and a "Login" button. Below the login fields, it says "To Reset Password or Retrieve Username [Click here](#)" where "Click here" is circled in red. A note at the bottom states "eVANTAGE is not available between 1:00am and 3:00am EST."

The client will need to enter their:

1. Account Number

**Please Note:** The Client will need to refer to their *Welcome Letter* or *Account Statement* to get the Account Number. If their account number starts with a 'Z' or 'ZP' followed by 6 digits, they will be required to enter the account number in its entirety including the starting letter(s).

2. the Personal Identification Number (PIN) of the account number entered
3. the Social Security Number with dashes
4. Click *Verify Information*



[Terms of Use](#) | [Privacy Policy](#) | [Equity Trust Home](#) | [Security](#)

### Reset Password and Retrieve Username - Step 1

Before you can reset your Password and retrieve your Username, we need to verify ownership of your account. We use the three items below to do this.

Please enter an Account Number, the Personal Identification Number (PIN) for that Account, and your Social Security Number (i.e. 000-00-0000) in the fields below.

**⚠ Please Note:** Due to recent system changes, some of Equity Trust Company accounts will now begin with a capital letter followed by six digits. Please refer to your quarterly account statement or account welcome letter to retrieve your account number.

**If you have a Traditional, Roth, SEP, SIMPLE, HSA or CESA -** Your account number will now may begin with a capital "Z" followed by six numbers. If your original account number was less than six digits, zeroes "0" will now be added to the beginning of your account number following the "Z" in order to bring your account number to a total of six digits after the "Z". For example, if your account number originally contained only five numbers (ie: #12345), it will now begin with a "Z" then a "0" followed by your original account number. (IE: Z012345.)

**If you have an Individual-K or a Roth Individual-K -** Your account number will may now begin with a capital "ZP" followed by six numbers. If your original account number was less than six digits, zeroes "0" will now be added to the beginning of your account number following the "ZP" in order to bring your account number to a total of six digits after the "ZP". For example, if your account number originally contained only five numbers (ie: #12345), it will now begin with a "ZP" then a "0" followed by your original account number. (IE: ZP012345.)

**⚠ In order to reset your password you had to have previously created a myEQUITY / eVANTAGE name and password. If you have not done so, please enroll in myEQUITY / eVANTAGE**

\* Account Number:

1

\* PIN:

2


\* Social Security Number (i.e. 000-00-0000):

3

4

## Step 2

1. Enter New Password
2. Confirm New Password
3. Click *Reset Password*



[Terms of Use](#) | [Privacy Policy](#) | [Equity Trust Home](#) | [Security](#)

### Reset Password and Retrieve Username - Step 2

Please enter your new Password in the two fields below. Upon completion of Password reset, your Username will be displayed. For your record, a notification email will be sent to the email address on file containing your Username.

\* New Password:

1

\* Confirm New Password:

2

3

The Confirmation Page will display:



[Terms of Use](#) | [Privacy Policy](#) | [Equity Institutional Home](#) | [Security](#)

**Your Password has been reset.**

**Your eVantage Username is:** [REDACTED]  
**An email has been sent to** [REDACTED] **for your records.**

[Proceed to Login](#)

An email is sent to the email account on file alerting to the password change with the UserName included

[Back to eVANTAGE - General Information](#)

Click [here](#) to go back to eVantage - General Information

## eVANTAGE - Recent Activities

On this page:

- [eVANTAGE - Recent Activities](#)
- [Viewing & Filtering](#)
- [Cancelling a One-time Bill Payment request](#)
- [Back to eVANTAGE - General Information](#)

The client can see a list of all recently open/ currently open activities in their account. The client can filter the information show by Activity Type. The client can also 'CANCEL' a one-time Bill Payment request as long as that transaction has not entered 'In- Process' status. The 'Cancel' link will be displayed next to bill pay requests that are eligible for cancellation.

### Viewing & Filtering

Log in to the system and choose the Account for which to view Recent Activities.

The screenshot shows the eVANTAGE system interface. At the top, there is a navigation bar with the following links: [Choose Accounts](#), [User Profile](#), [Help](#), and [Logout](#). The [Choose Accounts](#) link is circled in red. Below the navigation bar, there is a dark blue banner that says "Welcome to eVANTAGE". Underneath the banner, there is a section titled "Choose an Account below to get Started!" which contains a table with the following data:

Account Number	Account Type	Account Value	Available Cash
123456789	Traditional IRA	\$221,554.69	\$105.85
987654321	Health Savings Account	\$0.00	\$0.00
Total Value of Accounts		\$221,554.69	\$105.85

Below the table, there is a yellow warning box that says: "ATTENTION: Our Custodial Account Agreement has been updated as of 01/09/2013. You can find a copy [here](#)."

Click on **Recent Activities** from the menu on the left-hand side of the screen.

The screenshot shows the eVANTAGE system interface with the 'Recent Activities' menu item circled in red on the left-hand side. To the right of the menu, there is a summary table for the selected account with the following data:

Name:		Cash Balance:	\$106.22
Account Type:	Traditional IRA	Uninvested Cash:	\$0.00
Account Open Date:	02/15/2012	Account Value:	\$221,553.87
Available Cash Balance: \$106.22			

From the **Filter By Activity Type** dropdown client may chose specific activity type to quickly see a filtered view of all recent activities of that transaction.

## Recent Activities

<b>Name:</b>	Puff Darlin'	<b>Cash Balance:</b>	\$3,580.00
<b>Account Type:</b>	Traditional IRA	<b>Uninvested Cash:</b>	\$0.00
<b>Account Value:</b>	\$4,591.02	<b>Available Cash Balance:</b>	\$2,864.97

View By:  Current Activities  Archived Activities

Filter By Activity Type:

Show All

Show All

Bill Pay DOI

Conversion-Recharacterization

Direction of Signature

Distribution

eVANTAGE Maintenance Change

FMV

Incoming Cash


DOI

Returned Funds

Sale-Redemption

Transfer In

Transfer Out



Status	Activity Number	IRN	Action	Description		
In Process	AD588701		File Maintenance	Change Fax		
Waiting Original	AD588700		Real Estate DOI	1 123 somestreet, somecity, OH, 44106, (eVANTAGE)		
Waiting Original	AD588699		Real Estate DOI	100 test, test, OH, 44145, (eVANTAGE)		
Waiting Original	AD588698		Private Debt DOI	1, unsecured for borrower name3, eVANTAGE	05/09/2014	
In Process	AD588697	I0018961	Bill Pay	1.01 description(WIRE)	05/09/2014	
Corrections	AD588696		File Maintenance	COA	05/09/2014	
In Process	AD588646		File Maintenance	COA	05/02/2014	
In Process	AD588569	I0018961	Bill Pay	1.00 desc(Reg Ck)	04/29/2014	

### Cancelling a One-time Bill Payment request

To **Cancel** an eligible one-time Bill Payment item, click the 'Cancel' link displayed below the activity number of the said item listed.

Status	Activity Number	IRN	Action	Description	Date Received	Date Completed
Pending	AP1164778 <span style="border: 2px solid red; border-radius: 50%; padding: 2px;">Click to Cancel</span>	ID117540	Bill Pay	1.00 Test(Reg Ck)	05/08/2014	

### Back to eVANTAGE - General Information

Click [here](#) to go back to eVantage - General Information