eVANTAGE Information - General Information

On this page:

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

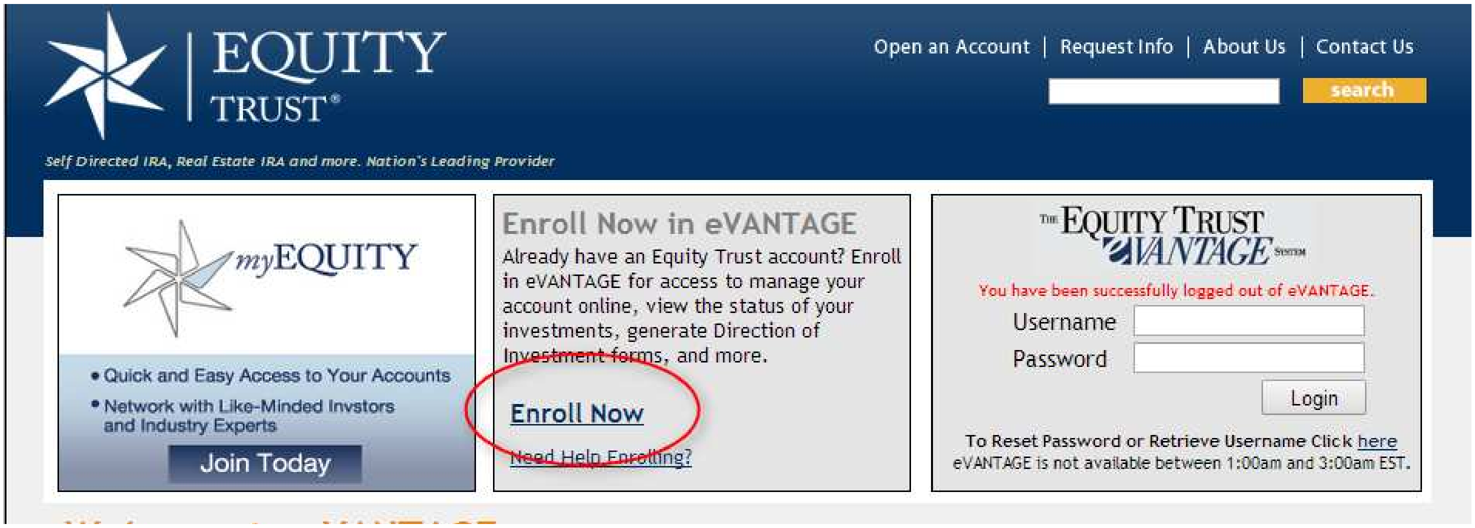
All clients of Equity Trust are eligible to enroll into the eVANTAGE system. In order to enroll, he/she must know the account number and have a PIN (personal identification number) set for that account, as well as enter their Social Security Number. Visit the Enrollment Guide for a step-by-step guide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

When is the account active

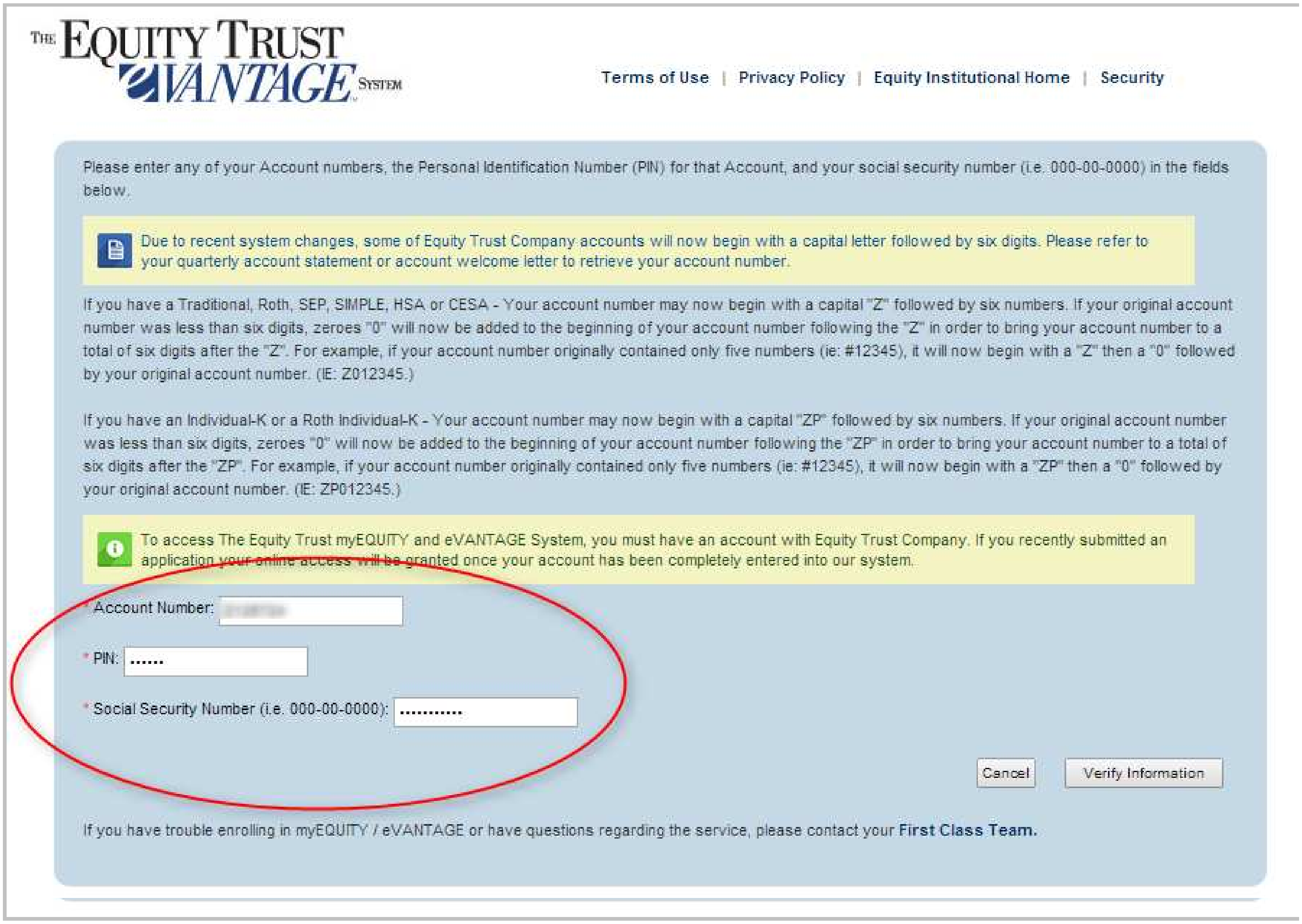
You are able to enroll as soon as the account has been created by our Account Maintenance Team. Once the account has been logged into our system, you are immediately eligible to enroll into eVANTAGE.

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

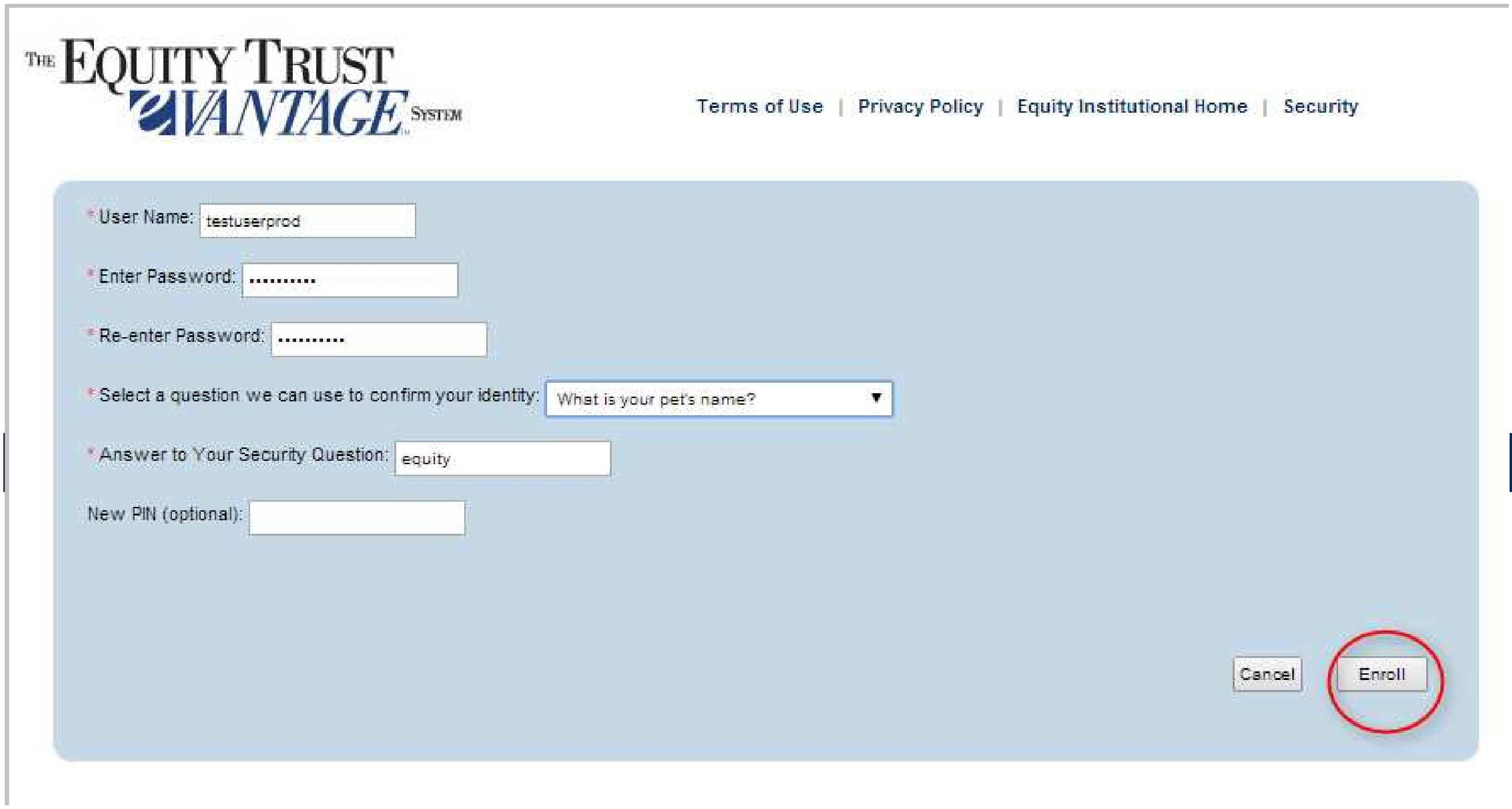
1. **On the eVantage login page, click "Enroll Now" to create your User ID.**



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



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



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/

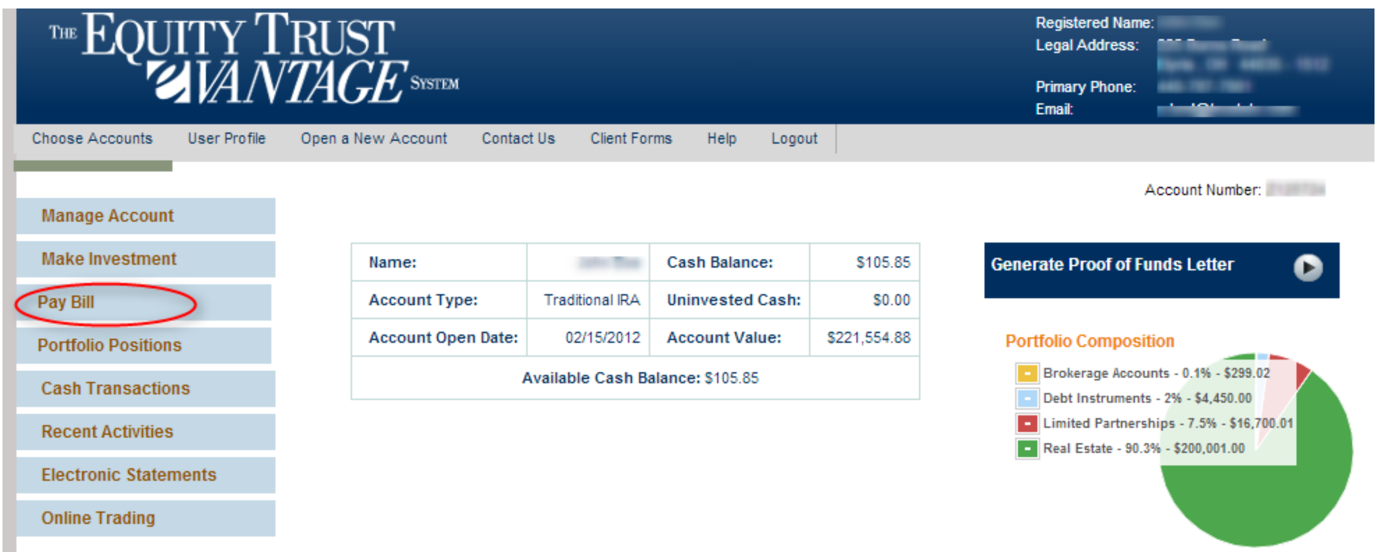
Microsoft Internet Explorer - http://www.microsoft.com/windows/ie/downloads/default.mspx

eVANTAGE - Online Bill Pay Walkthrough

On this page:

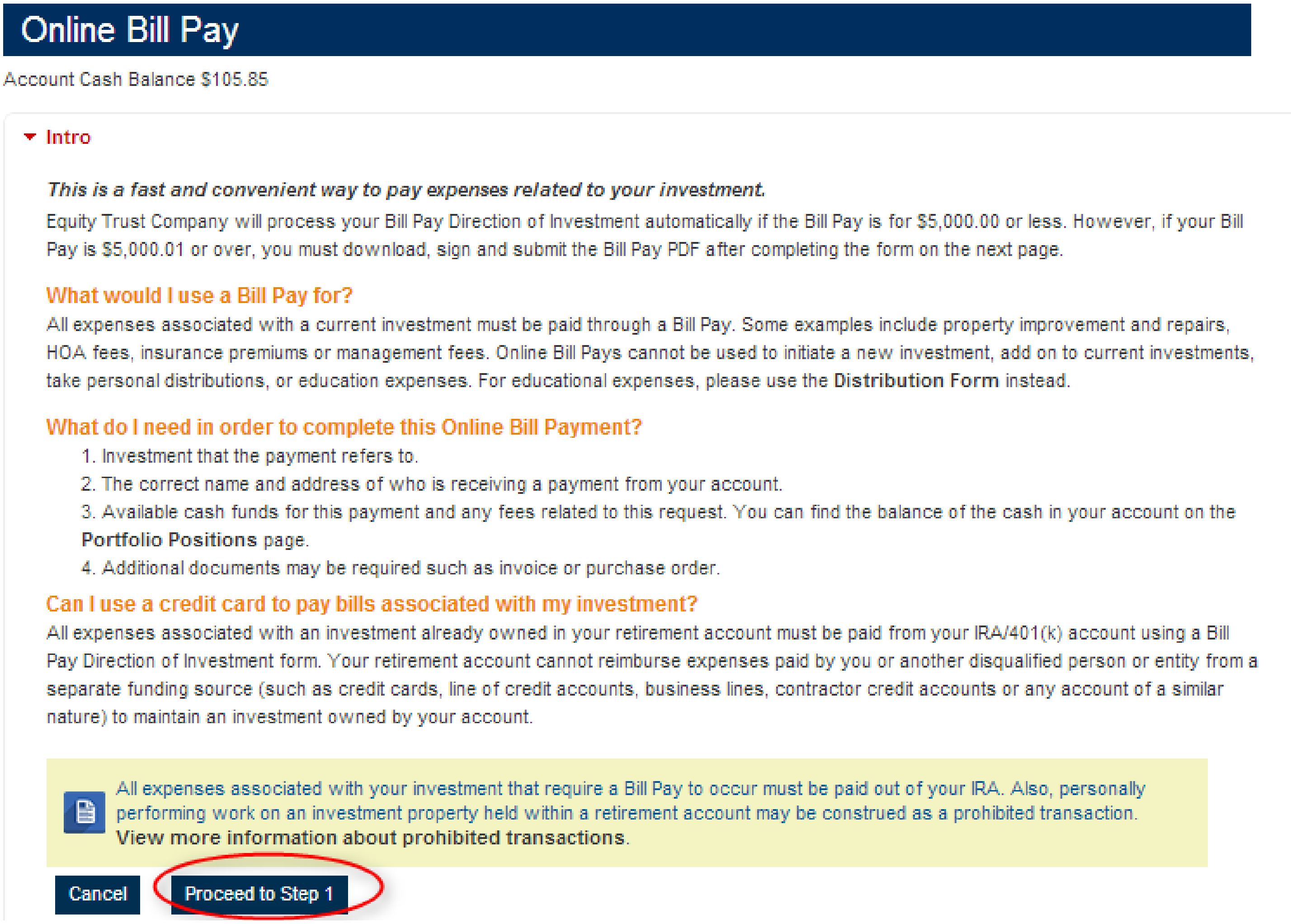
Pay Bill

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



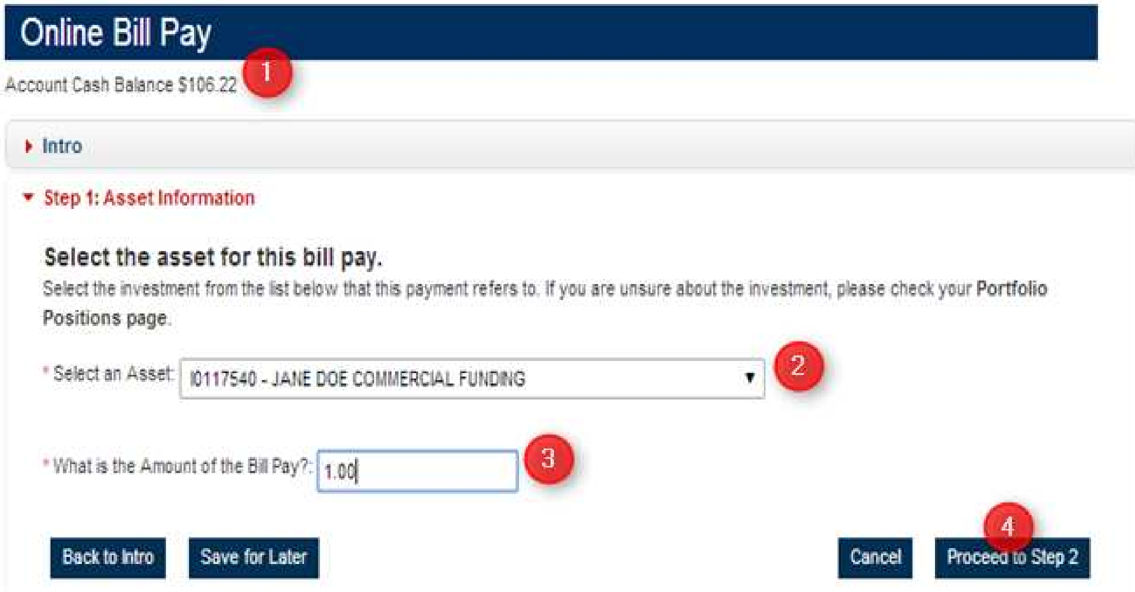
Online Bill Pay Introduction

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



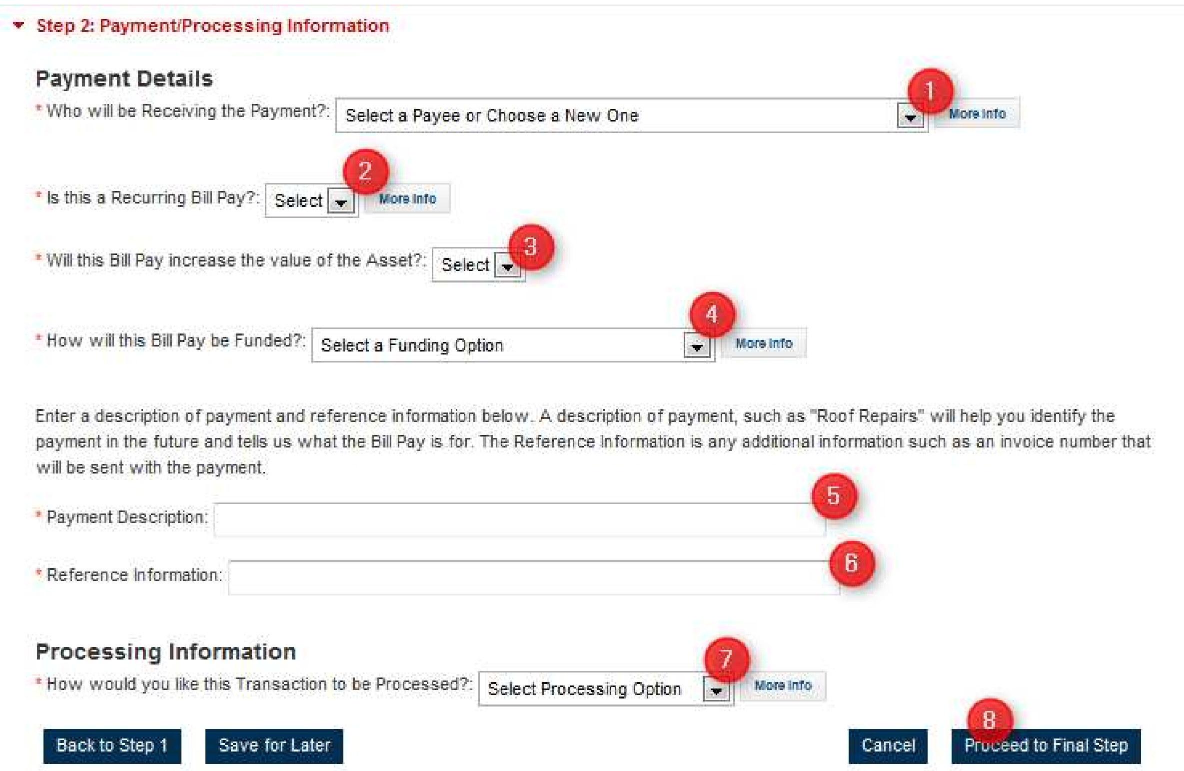
Step 1 – Asset Information

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

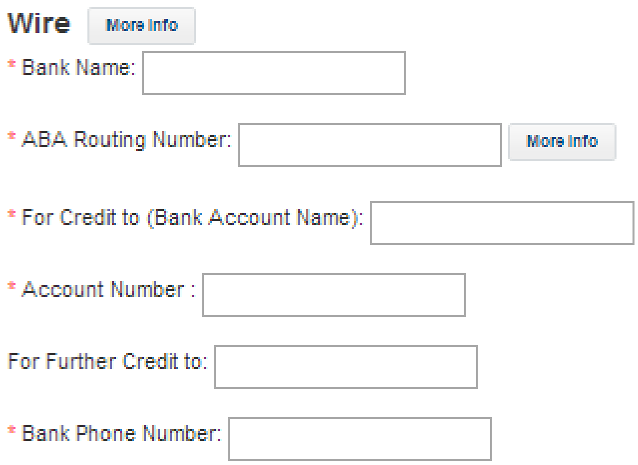


Step 2

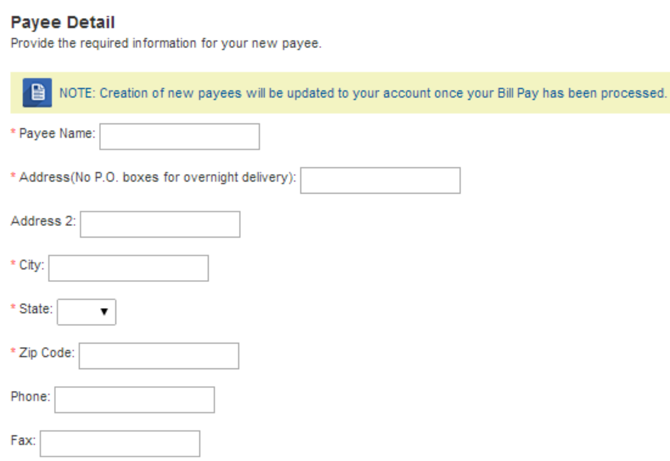
1. Choose and existing payee from the dropdown or Create New Payee if adding a new one
2. Select if it is a new Recurring set up or a One Time Bill Pay.
   a. If Recurring is chosen, the payment method defaults to Regular Check Regular Mail
3. Choose how the Bill Pay will be paid
   a. Wire
   b. Cashier's 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



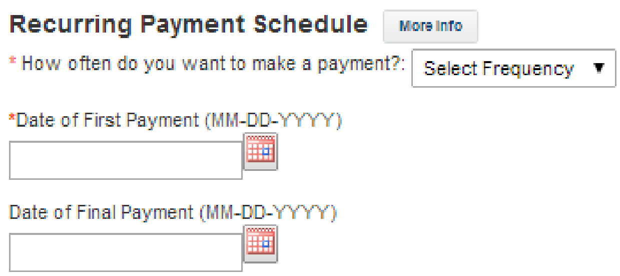
If funding by Wire:



If funding by Check:



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



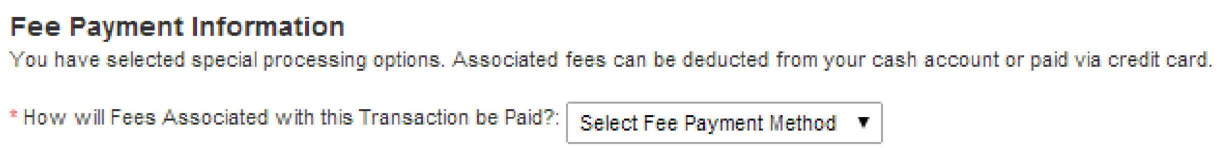
Recurring Payment Schedule More Info

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

*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:

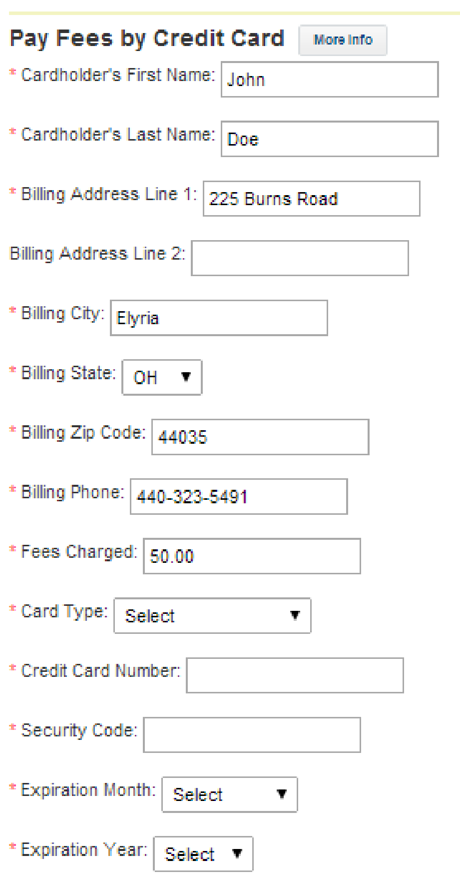


Fee Payment Information

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?: Select Fee Payment Method

If Credit Card is selected:



Pay Fees by Credit Card More Info

* Cardholder's First Name: John

* Cardholder's Last Name: Doe

* Billing Address Line 1: 225 Burns Road

Billing Address Line 2:

* Billing City: Elyria

* Billing State: OH

* Billing Zip Code: 44035

* Billing Phone: 440-323-5491

* Fees Charged: 50.00

* Card Type: Select

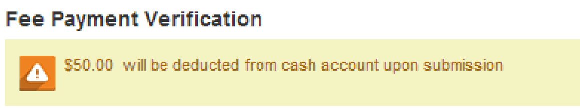
* Credit Card Number:

* Security Code:

* Expiration Month: Select

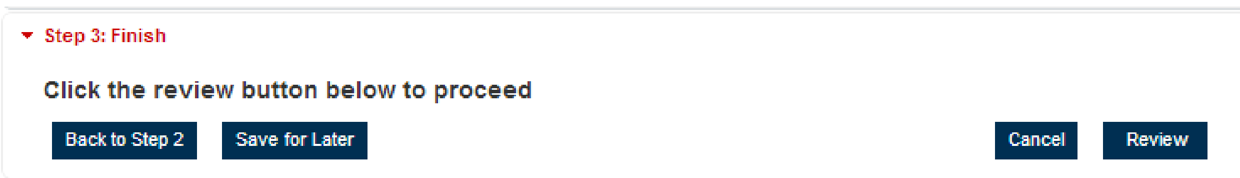
* Expiration Year: Select

If Cash is selected:



Step 3

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



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**. 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**. 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

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:

1. Carefully check your Bill Payment for errors.
2. Sign and date the bottom of the Bill Payment Direction of Investment form.
3. Fax the Bill Pay form to: 440-366-3751
4. 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!

Page 1 of 2

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

Processing Instructions

You have selected **Normal** 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**

Payment Details

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)

Check Remittance Details

Pay to the order of: ABC Lawn Care **C/O:**		
Street Address PO Box 123		
City Elyria	State OH	Zip 44035

Wire Funds Details

Bank Name	
Bank Phone Number	
Account Number	ABA Routing Number
For Credit To (Bank Account Name)	For Further Credit

Disclosure and Signature

IMPORTANT. PLEASE READ BEFORE SIGNING.

The undesigned 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 undertakn 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

Back to eVANTAGE - General Information

Click here to go back to eVantage - General Information

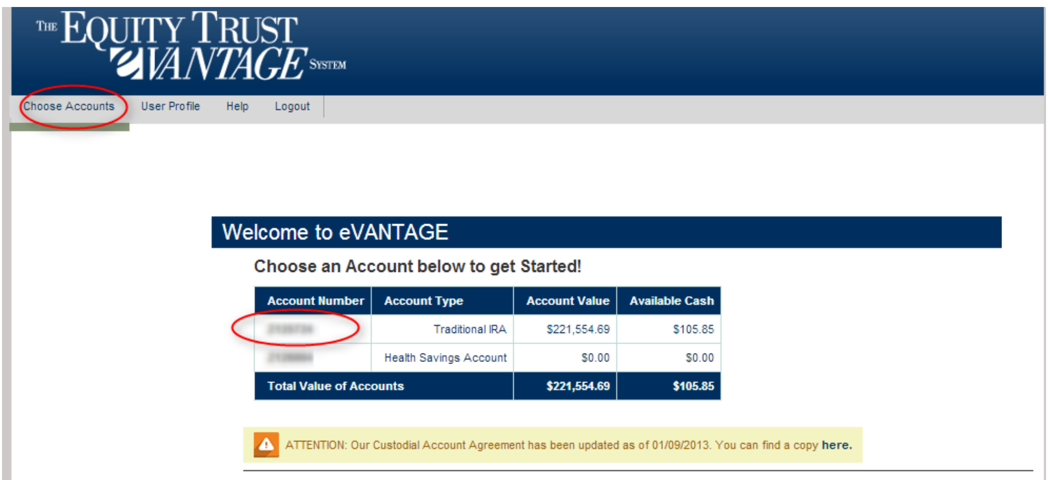
eVANTAGE - Cash Transactions

On this page:

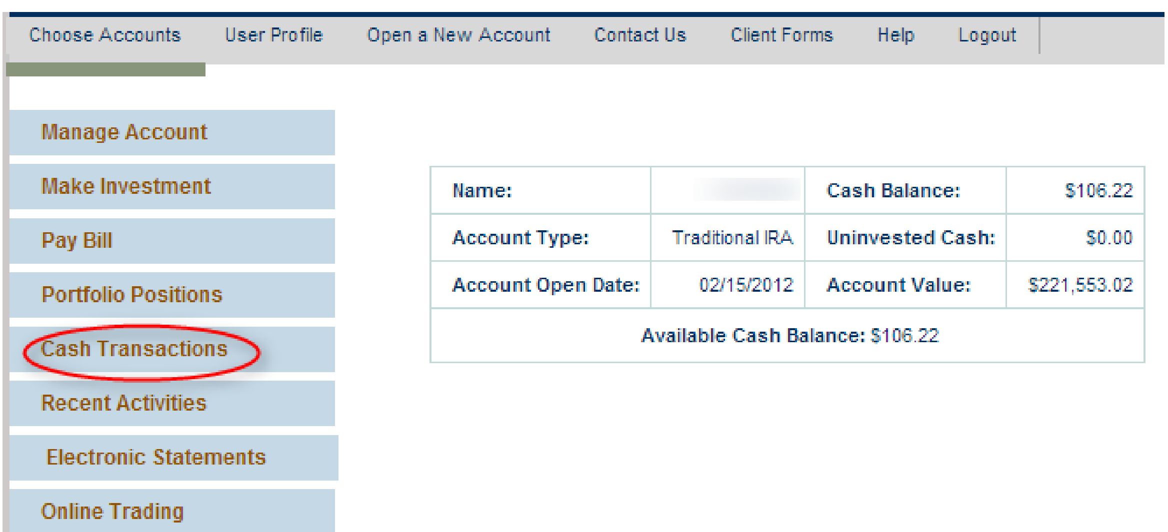
The client can see a list of all cash transactions for their account. The client may also download a comma delimited file (.csv) that can be imported into financial program that can import data from a .csv file.

Viewing & Sorting

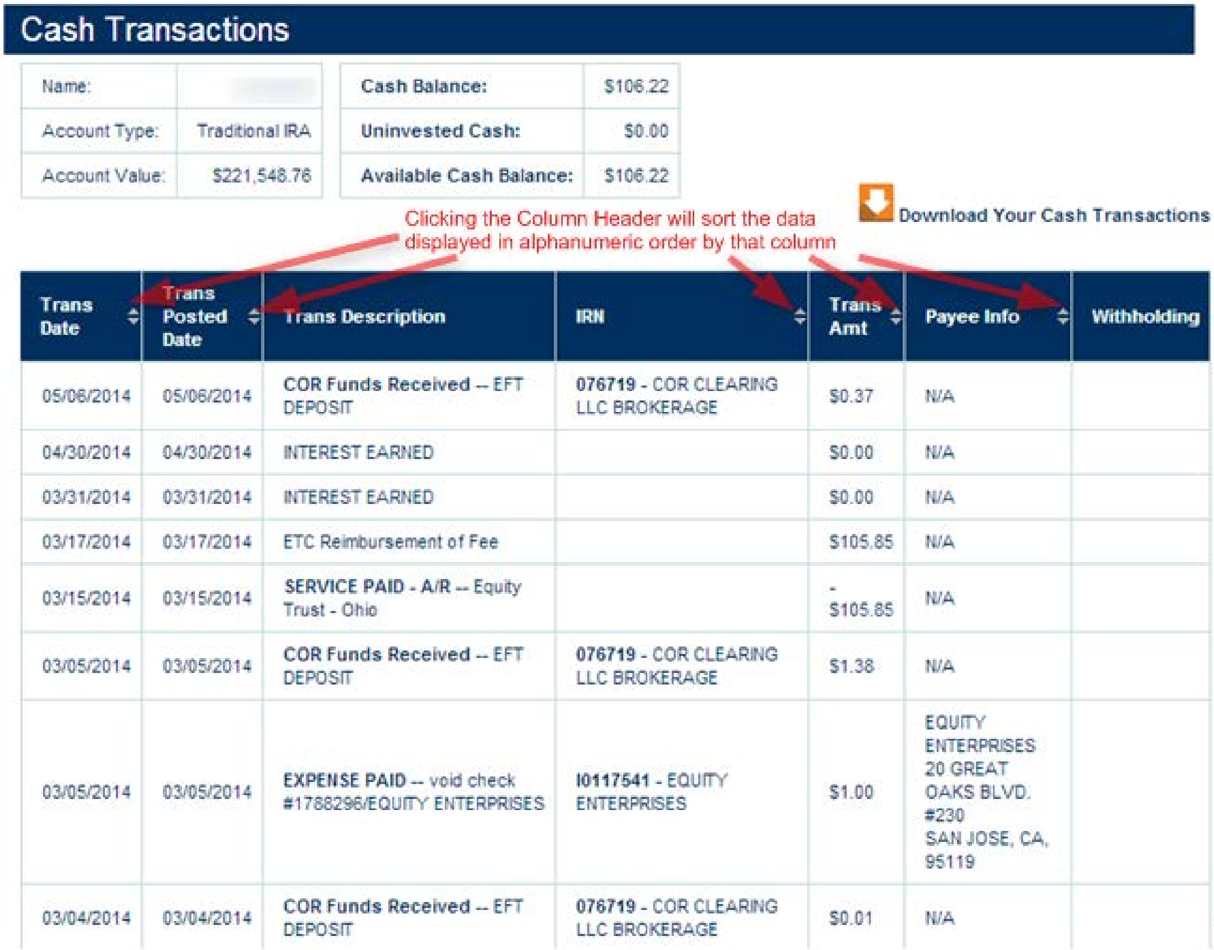
Log in to the system and choose the Account for which to view Cash Transactions.



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.



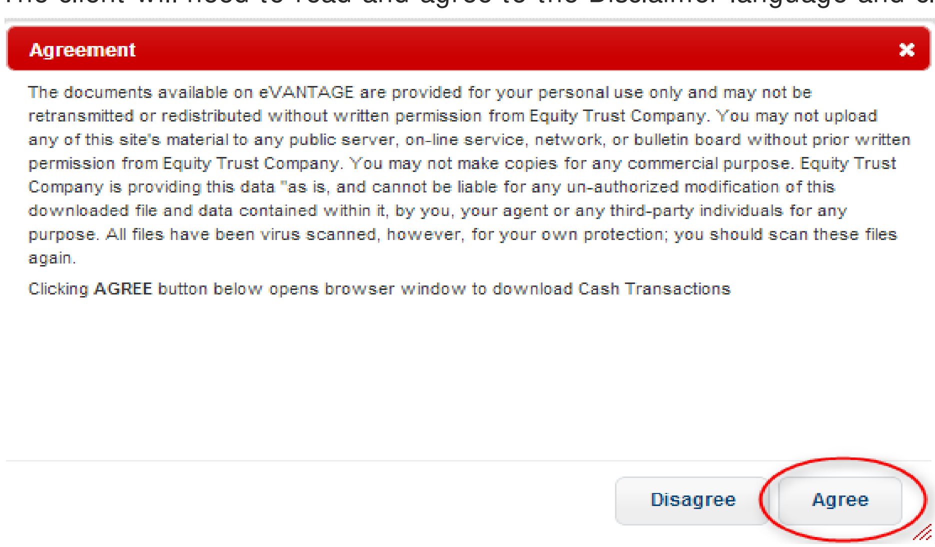
Name:		Cash Balance:	$106.22
Account Type:	Traditional IRA	Uninvested Cash:	$0.00
Account Value:	$221,548.76	Available Cash Balance:	$106.22

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	I0117541 - 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.



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.

Back to eVANTAGE - General Information

Click here to go back to eVantage - General Information

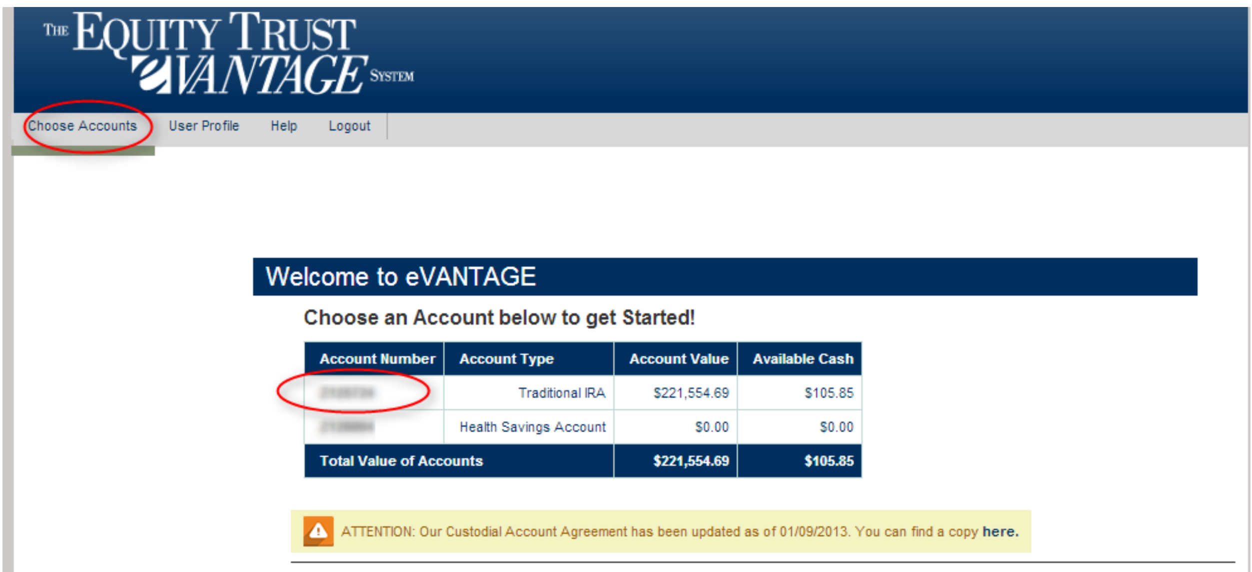
eVANTAGE - Pre-Filled Deposit Coupons

On this page:

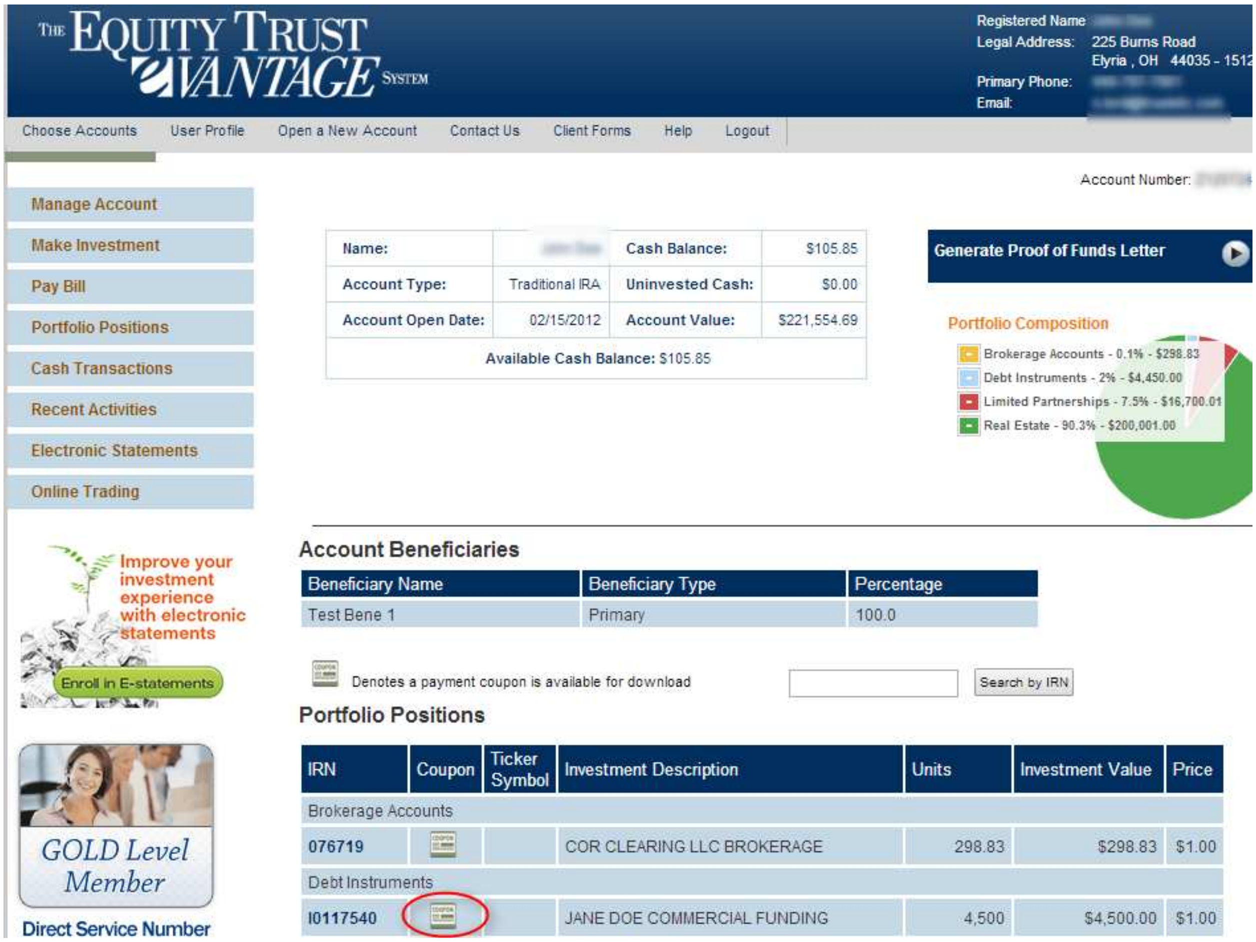
Print pre-filled Deposit Coupons - Create PDF's for deposit coupons for asset payments.

Deposit Coupons

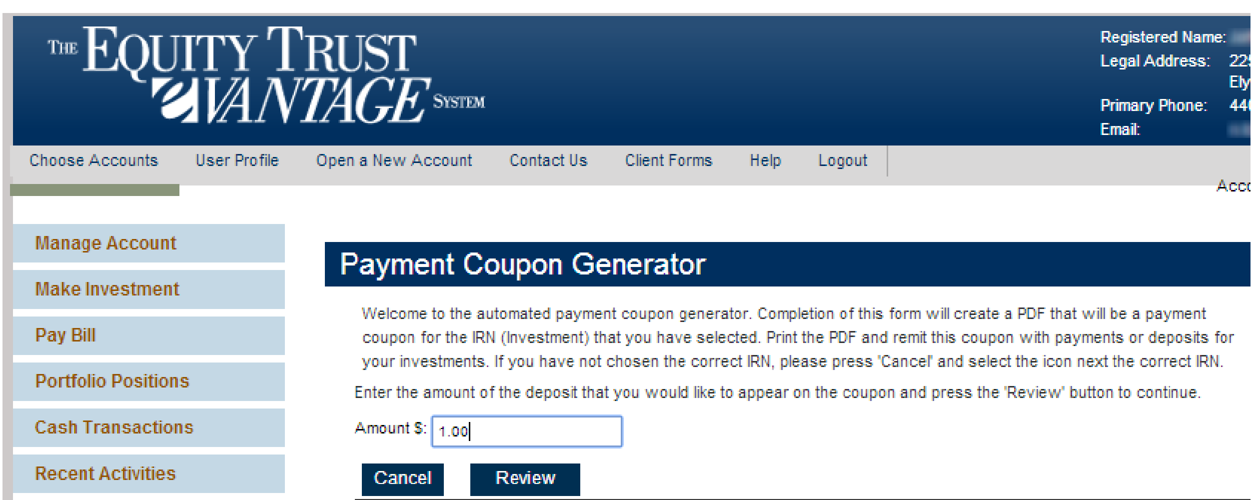
Log in to the system and choose the Account from which to generate Deposit Coupon.



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.



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



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

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


EQUITY TRUST COMPANY — Payment Coupon

FBO IRA Name:	
IRA Account:	
Investment Reference:	076719
* Payment Amount:	$1.00

IRN Description:
COR CLEARING LLC BROKERAGE

** If new payment amount is different from the amount listed above, enter correct amount here:* $

For IRA Owner or Loan Servicer: *New Ending Investment Balance:* $

SUBMISSION OPTIONS

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

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 , Account Number:

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:

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^{rd} quarter and the client enrolled before the end of the 2^{nd} quarter then they will have access, however if they did not enroll until after the 2^{nd} quarter then they will not have access until after the end of this quarter when the 3^{rd} 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

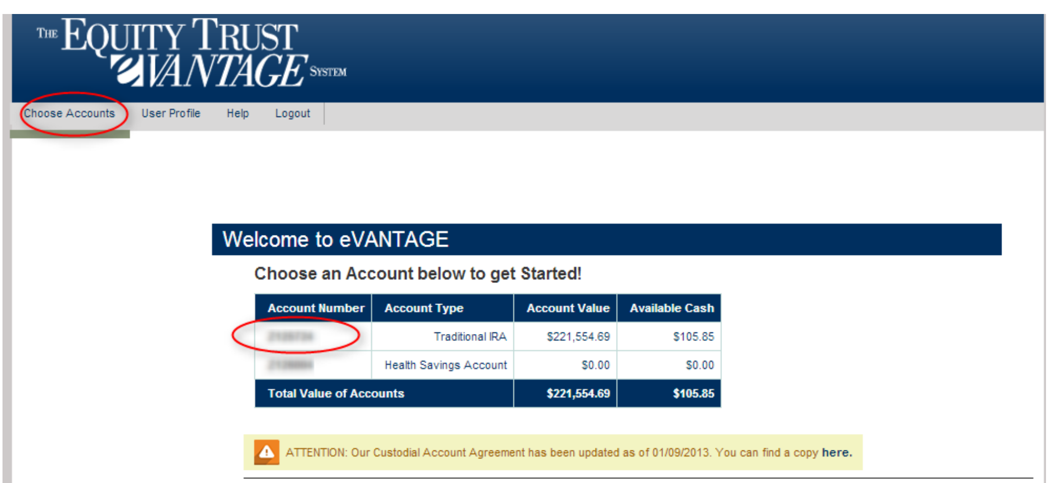
Email Notification to the client

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.

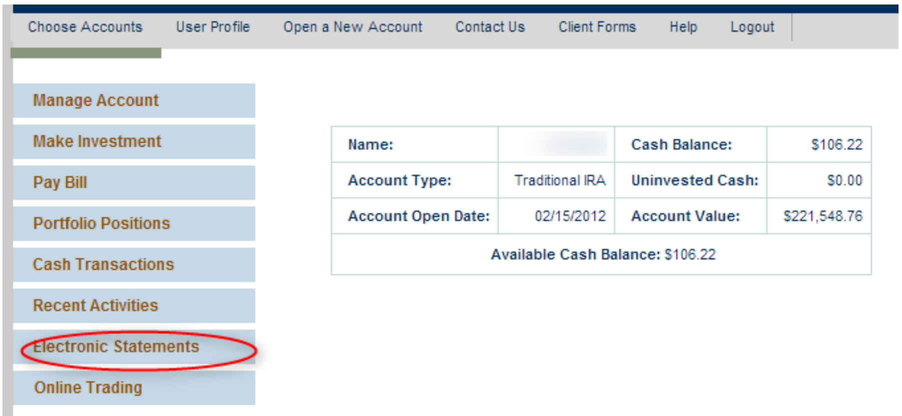
The email will come from **help@trustetc.com**

Instructions on locating eStatements through eVantage

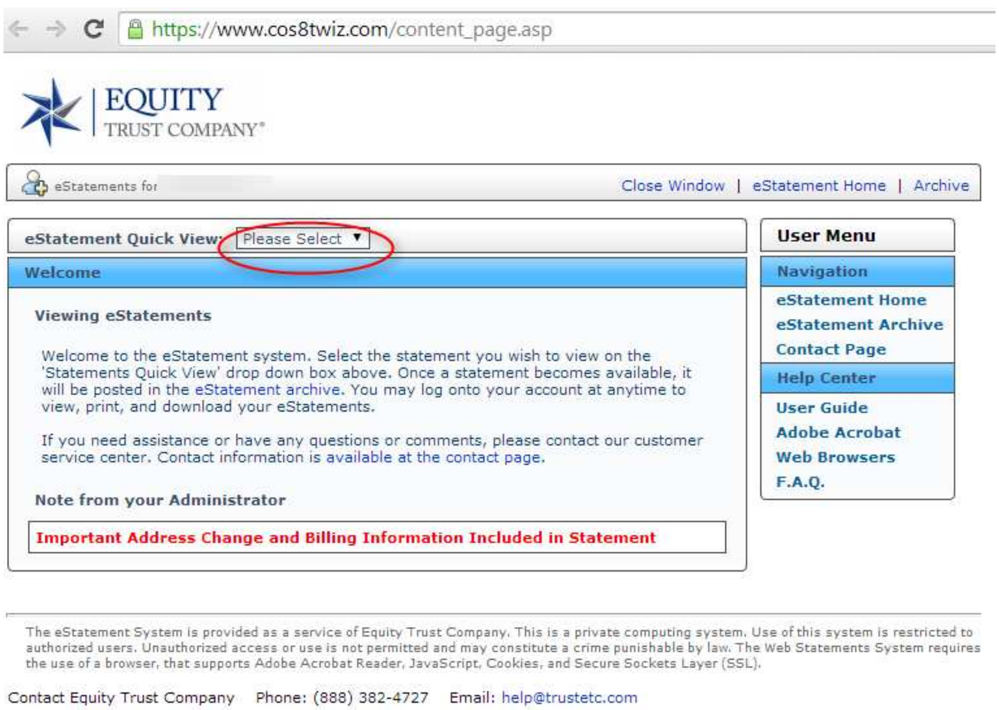
1. The client needs to log into their eVantage account and select the account number in which they would like to view their statements.



2. 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.



3. 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.



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

EQUITY TRUST COMPANY®
1 Equity Way
Westlake OH 44145

Return Service Requested

225 BURNS RD
ELYRIA OH 44035-1512

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

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	[illegible]	$221,550.45

Back to eVANTAGE - General Information

Click here to go back to eVantage - General Information

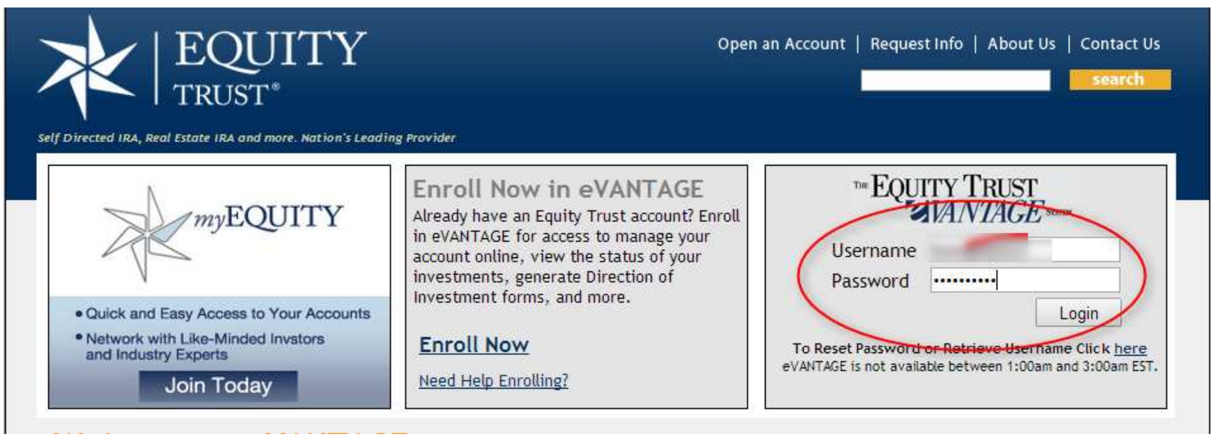
eVANTAGE - Enrolling into Electronic Statements (eStatements)

On this page:

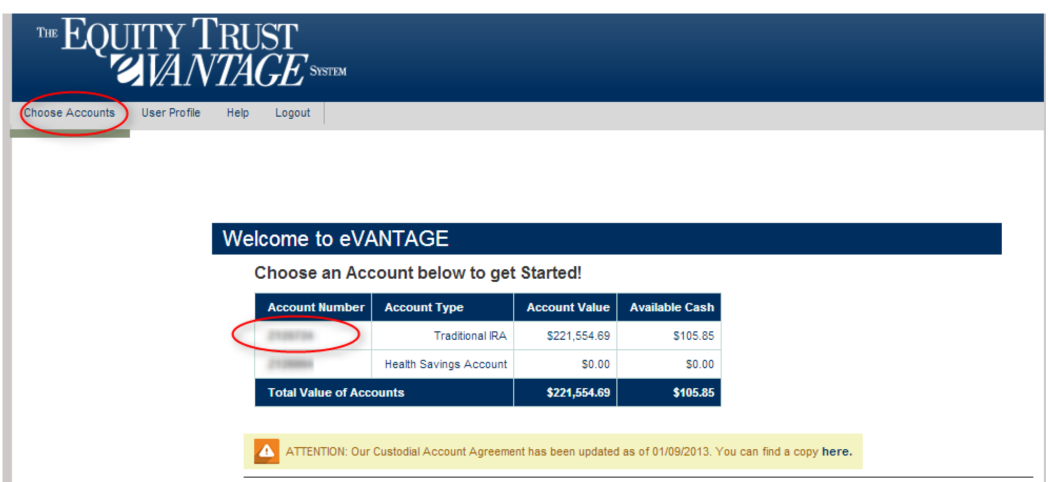
This article can also be referenced in the event that you choose to opt out of eStatements and instead receive Paper Statements.

Enrolling in eStatements

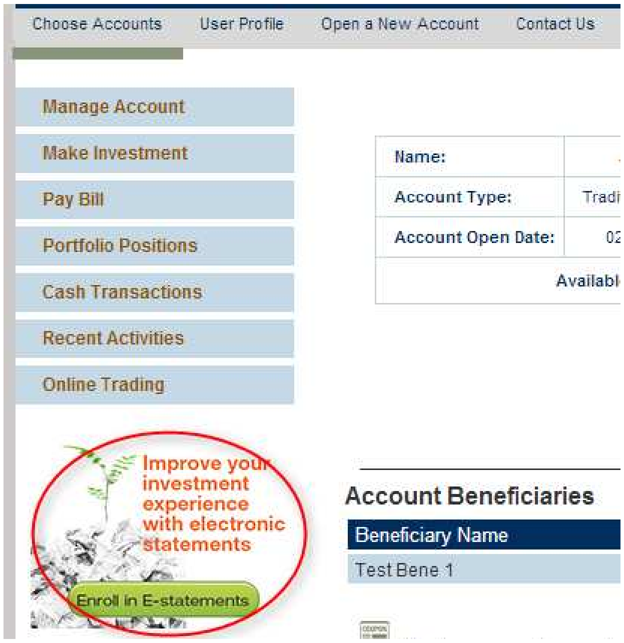
1. You login to eVantage by vising eVANTAGE login page inputting their Username and Password. If you have never enrolled in eVantage, you will need to enroll into eVANTAGE.



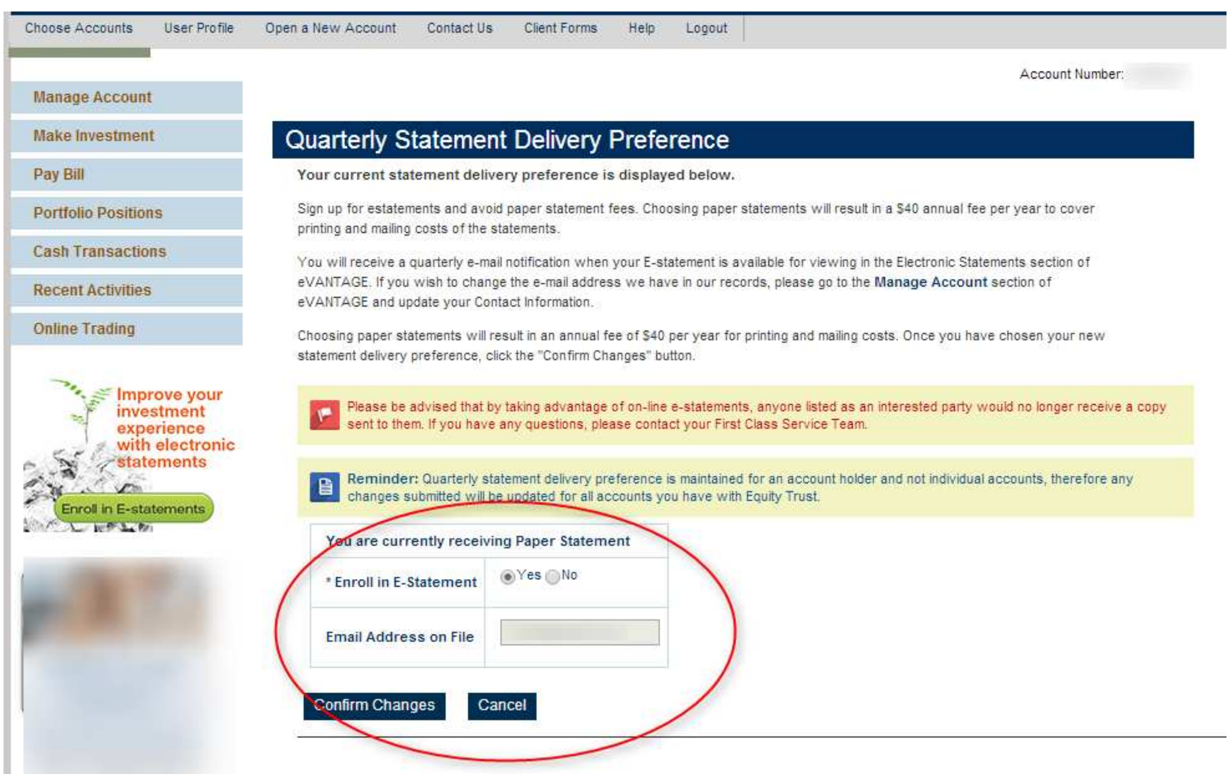
2. Once you have logged in you will choose an account



3. Click on the option to enroll in eStatements



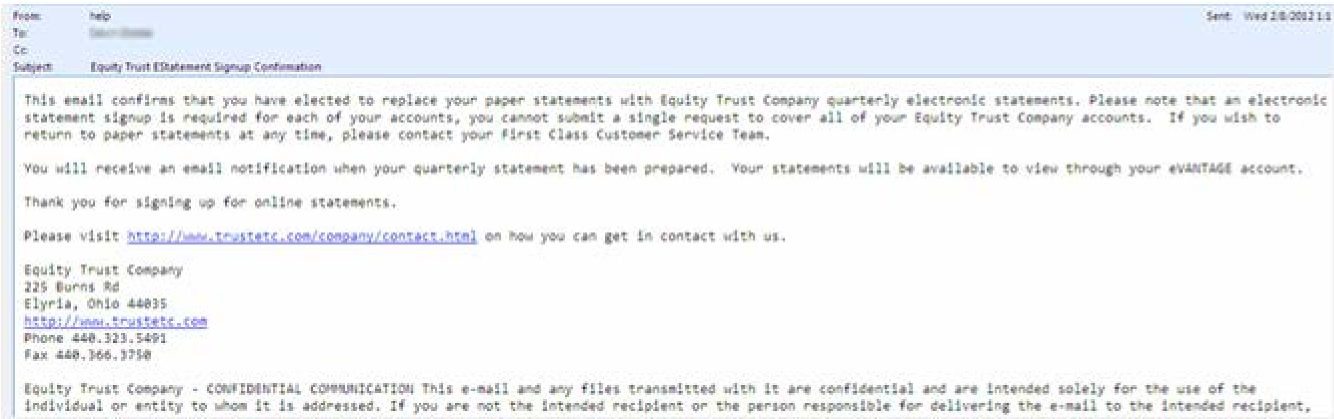
4. Next, select to enroll into **E-Statement** if they are currently are receiving Paper Statement (OR enroll into Paper Statement if they are currently receiving E-Statements) and click the "Confirm Changes" button. An action will be created in our processing system to modify their enrollment request. 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:


From: help
To:
Cc:
Subject: Equity Trust EStatement Signup Confirmation
Sent: Wed 2/8/2012 1:1

This email confirms that you have elected to replace your paper statements with Equity Trust Company quarterly electronic statements. Please note that an electronic statement signup is required for each of your accounts, you cannot submit a single request to cover all of your Equity Trust Company accounts. If you wish to return to paper statements at any time, please contact your First Class Customer Service Team.

You will receive an email notification when your quarterly statement has been prepared. Your statements will be available to view through your eVANTAGE account.

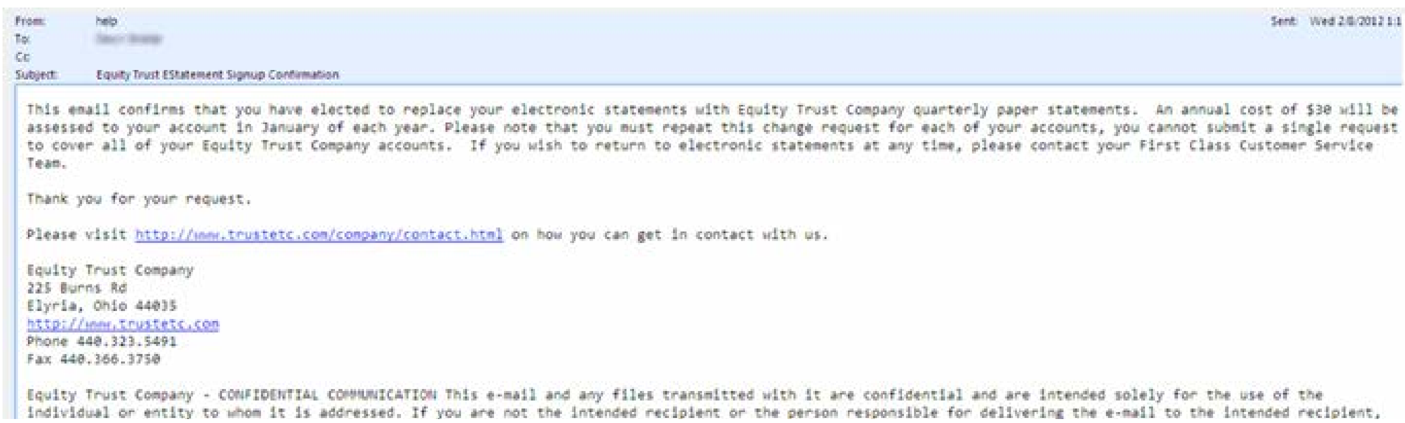
Thank you for signing up for online statements.

Please visit http://www.trustetc.com/company/contact.html on how you can get in contact with us.

Equity Trust Company
225 Burns Rd
Elyria, Ohio 44035
http://www.trustetc.com
Phone 440.323.5491
Fax 440.366.3750

Equity Trust Company - CONFIDENTIAL COMMUNICATION This e-mail and any files transmitted with it are confidential and are intended solely for the use of the individual or entity to whom it is addressed. If you are not the intended recipient or the person responsible for delivering the e-mail to the intended recipient,

Opts OUT of eStatements for Paper Statements:


From: help
To:
Cc:
Subject: Equity Trust EStatement Signup Confirmation
Sent: Wed 2/8/2012 1:1

This email confirms that you have elected to replace your electronic statements with Equity Trust Company quarterly paper statements. An annual cost of $30 will be assessed to your account in January of each year. Please note that you must repeat this change request for each of your accounts, you cannot submit a single request to cover all of your Equity Trust Company accounts. If you wish to return to electronic statements at any time, please contact your First Class Customer Service Team.

Thank you for your request.

Please visit http://www.trustetc.com/company/contact.html on how you can get in contact with us.

Equity Trust Company
225 Burns Rd
Elyria, Ohio 44035
http://www.trustetc.com
Phone 440.323.5491
Fax 440.366.3750

Equity Trust Company - CONFIDENTIAL COMMUNICATION This e-mail and any files transmitted with it are confidential and are intended solely for the use of the individual or entity to whom it is addressed. If you are not the intended recipient or the person responsible for delivering the e-mail to the intended recipient,

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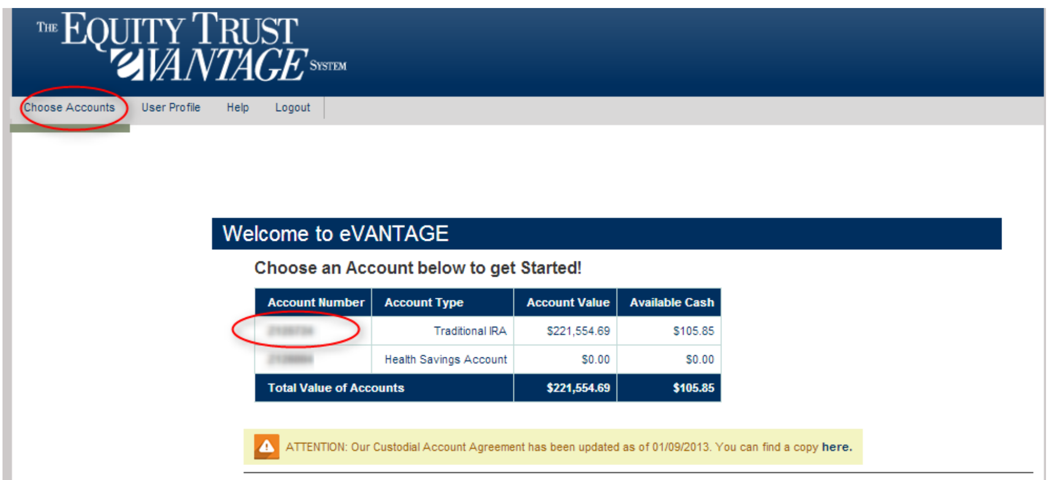
eVANTAGE - Online Maintenance Fee Payment

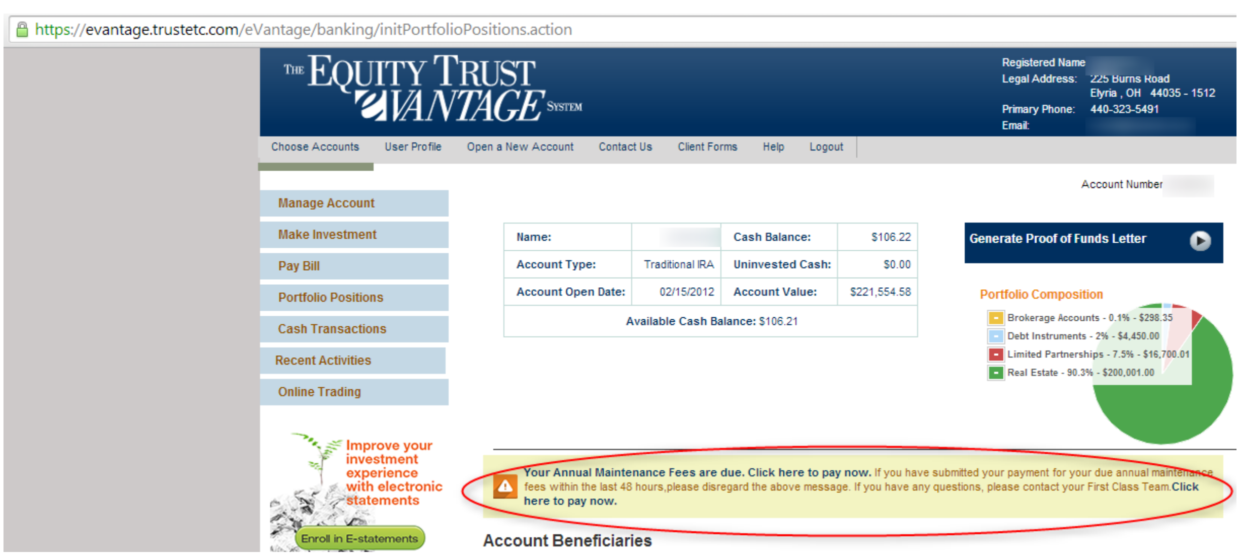
On this page:

Paying Yearly Maintenance fees

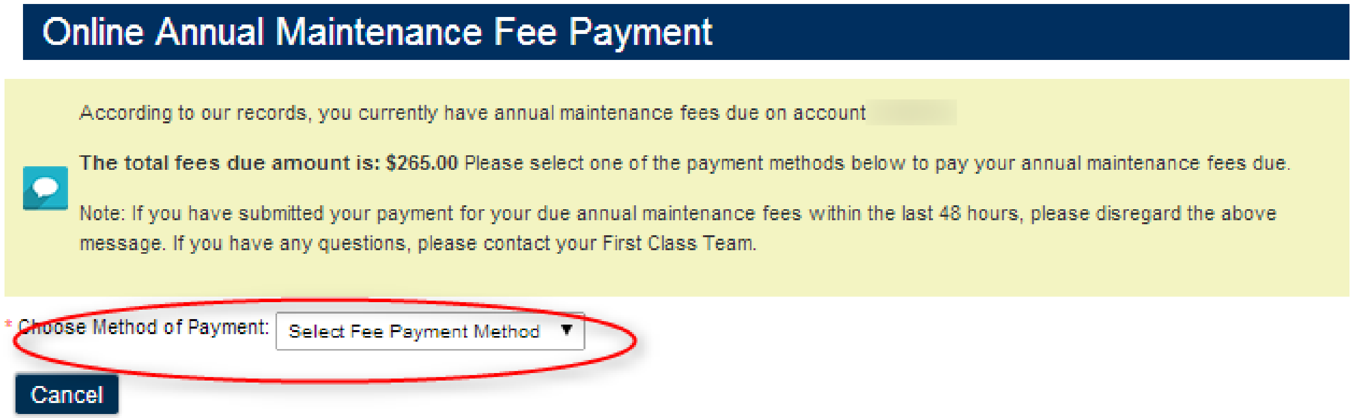
Log in to the system and choose the Account for which to pay Maintenance Fee.



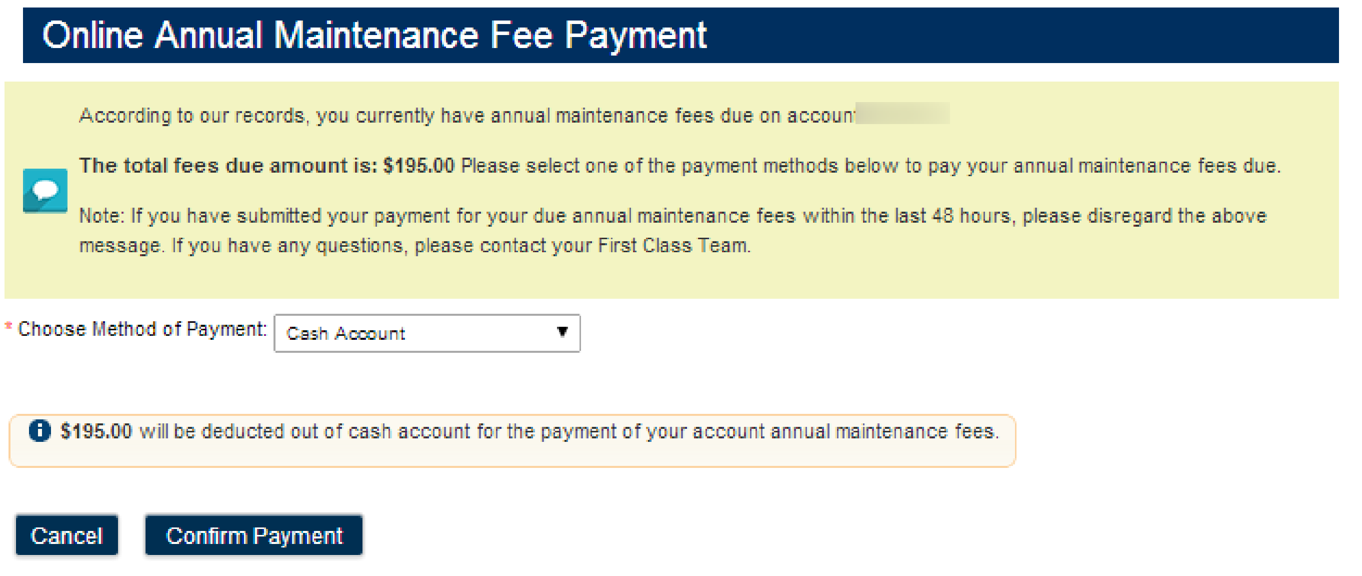
On the Portfolio Positions Page a notice will alert the client that they have fees due. The sentence is a link that says Your Annual Maintenance fees are due. Click here to pay now. This will allow clients to pay their fees online with either a credit card or deduct from their cash account.



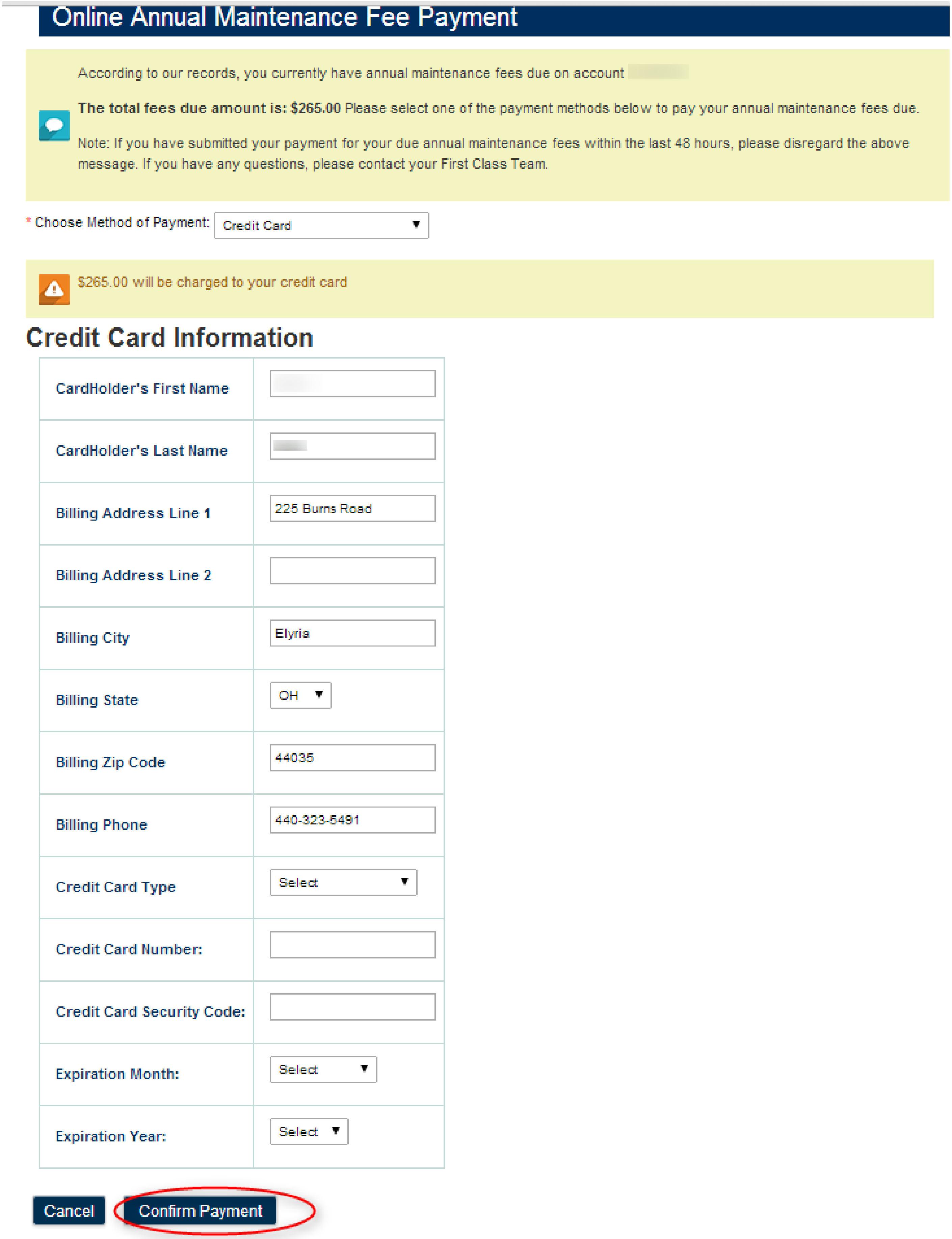
Choose method of payment:



If paid by Cash Account:



If paid by Credit Card:



Online Annual Maintenance Fee Payment

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

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: Credit Card

$265.00 will be charged to your credit card

Credit Card Information

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

Click Submit, the Confirmation page will display.

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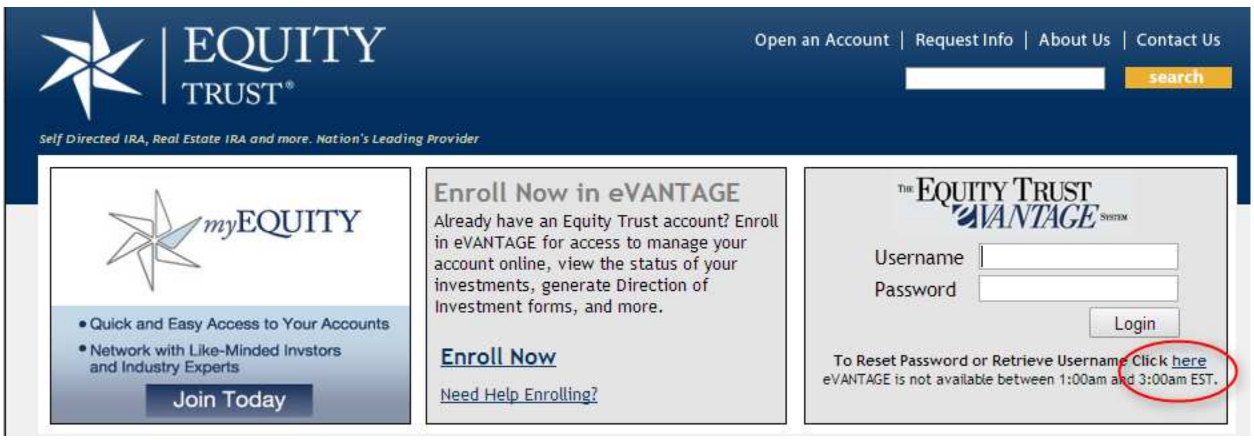
eVANTAGE - Password Reset and Retrieve Username

On this page:

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.

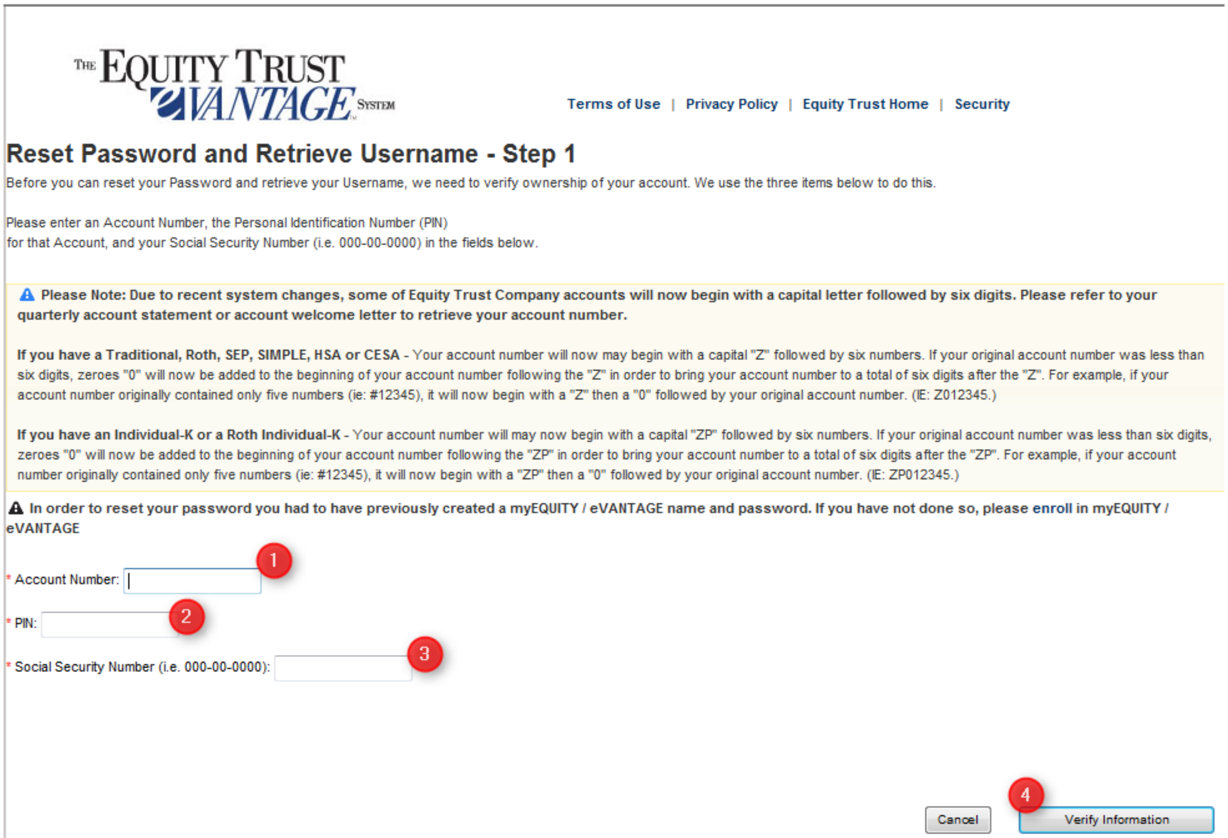


The client will need to enter their:

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).

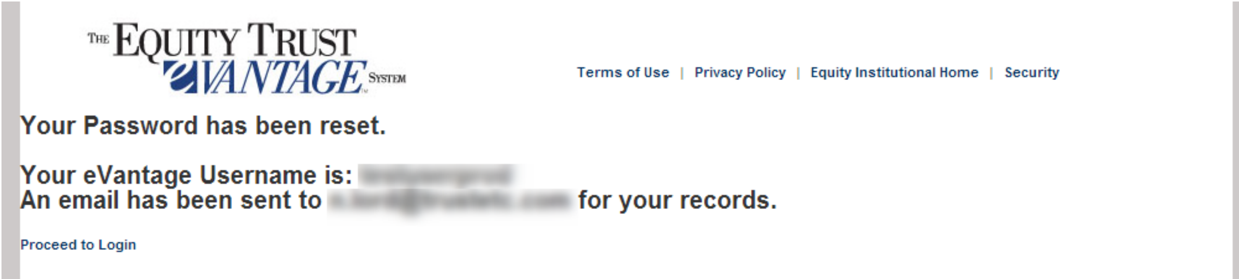
2. the Personal Identification Number (PIN) of the account number entered
3. the Social Security Number with dashes
4. Click *Verify Information*



Step 2

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

The Confirmation Page will display:



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

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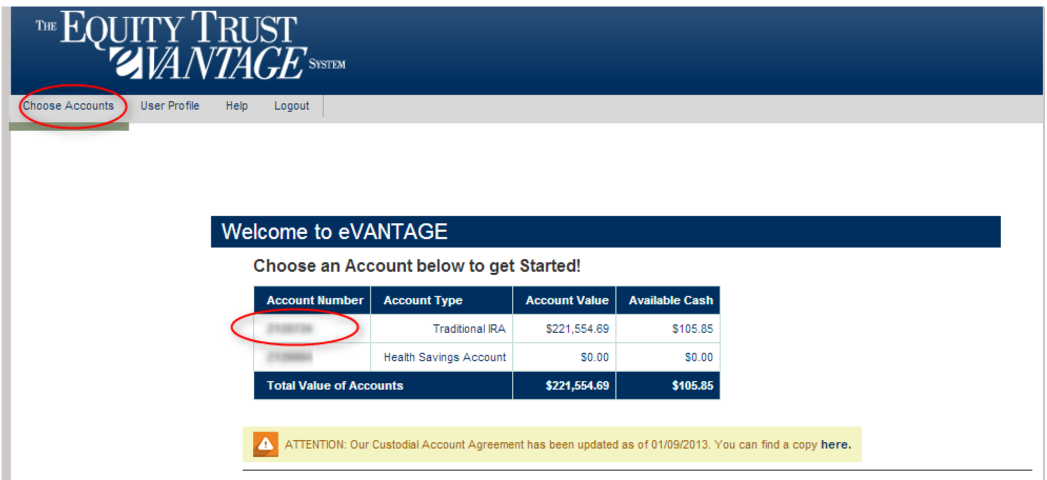
eVANTAGE - Recent Activities

On this page:

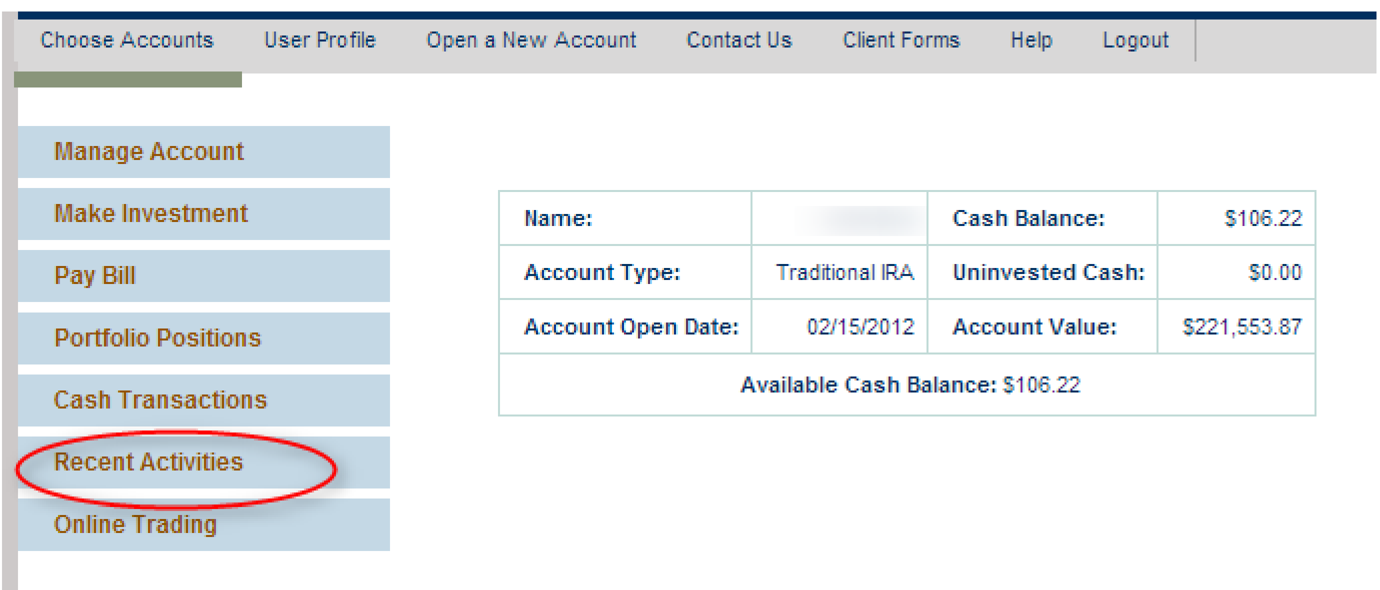
The client can see a list of all recently open/ currently open activities in their account. The client can filter the information show by Activity Type. The client can also 'CANCEL' a one-time Bill Payment request as long as that transaction has not entered 'In- Process' status. The 'Cancel' link will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

Viewing & Filtering

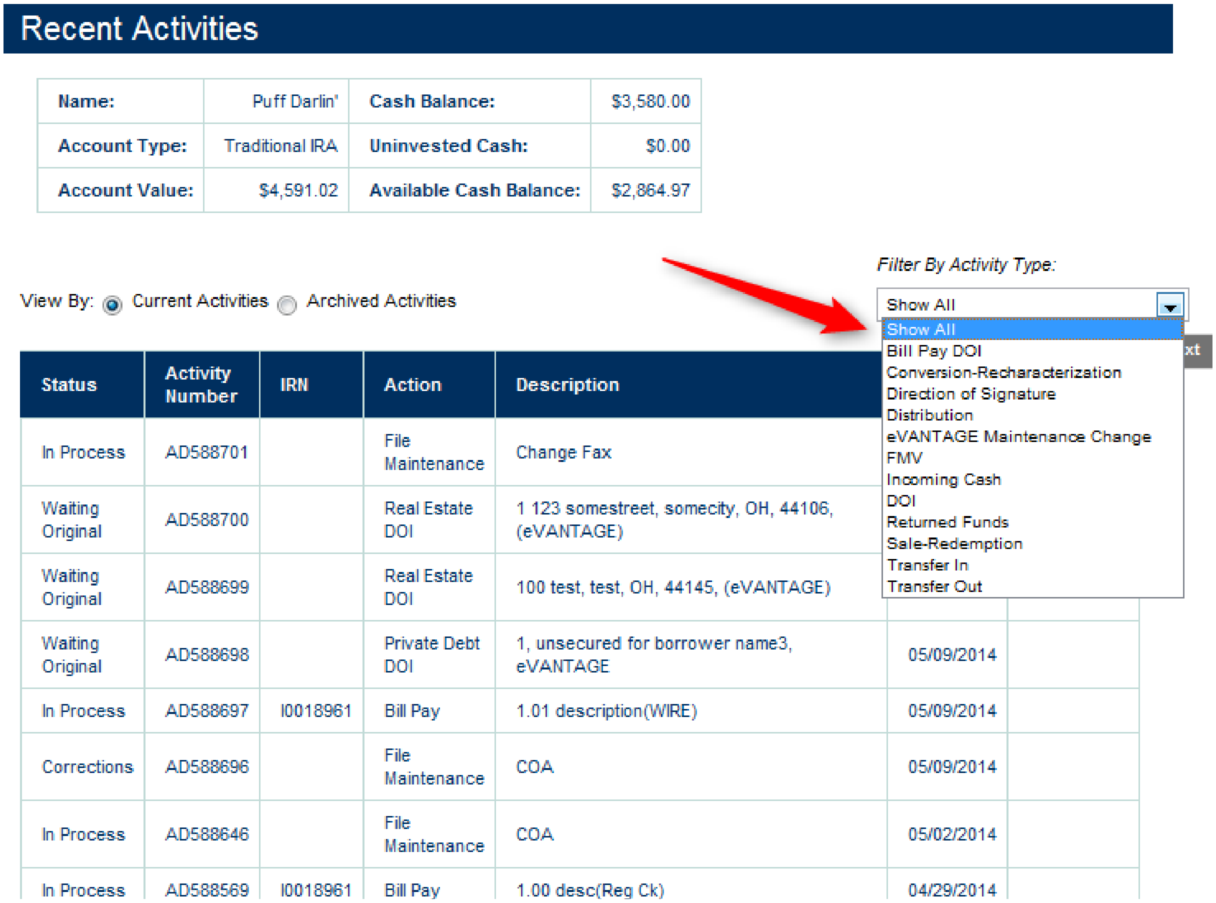
Log in to the system and choose the Account for which to view Recent Activities.



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



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.



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.

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