

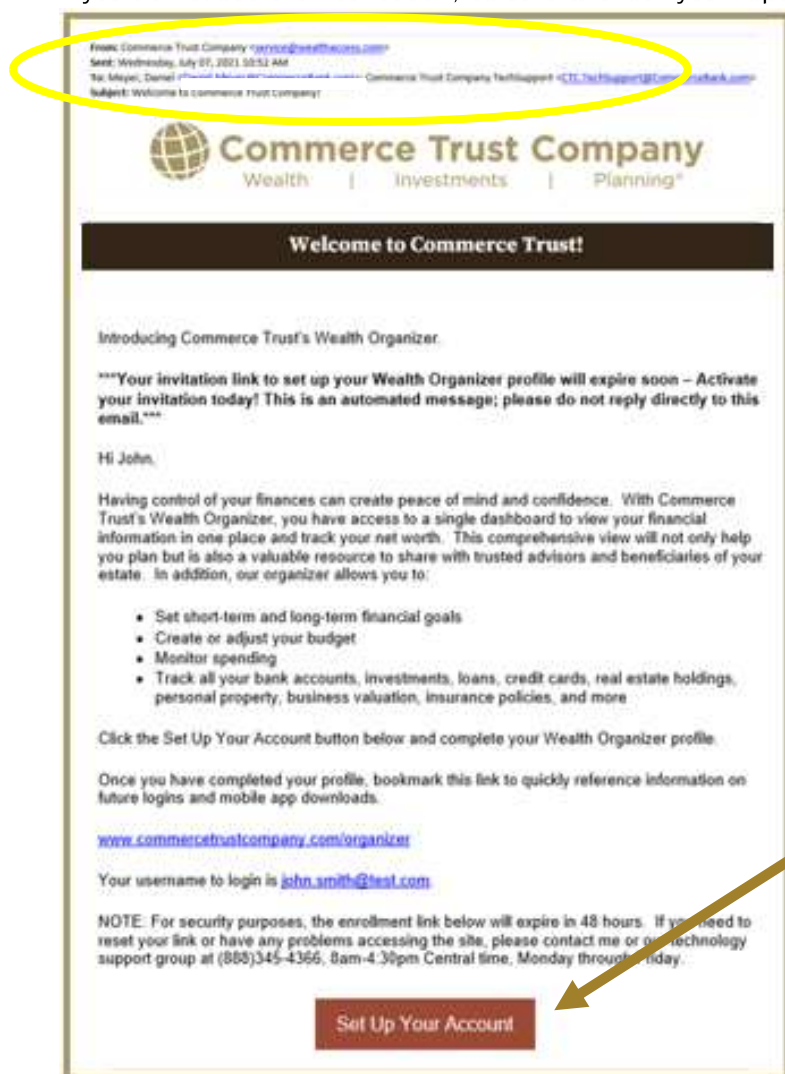
# Commerce Trust Mobile App

## HOW TO ENROLL & SET UP THE COMMERCE TRUST MOBILE APP

### WELCOME EMAIL

You will receive an email from Commerce Trust Company ([service@wealthaccess.com](mailto:service@wealthaccess.com)) **“Welcome to Commerce Trust!”** welcoming you to use the new mobile app.

If you do not see the notification, be sure to check your “spam” or “junk” folder.



Tap the “Set Up Your Account” button.



# Commerce Trust Mobile App

## WELCOME EMAIL (Continued)

### ***IMPORTANT***

*The welcome email will be sent to the email address on file. You will have **48 hours to complete the steps to finalize your enrollment and then download the app to your device.***

*If the setup link expires, call (888) 345-4366, 8:00 AM – 4:30 PM central time, Monday through Friday to request a new link.*

## STEPS TO SETTING UP YOUR ACCOUNT

You'll be asked to complete a few steps to set up your account.

### Creating Your Password (Step 1 of 4)

Username: Your username is the email address you provided for your account.

Password: Create and confirm your password. Make note of your password for future reference. Your password must:

- Be at least 8 characters long
- Have at least 1 number
- Have at least 1 lowercase character
- Have at least 1 uppercase character
- Have at least 1 special character (examples #, \$, %, &, \*)

Your username is the email address you provided. Type it here.

Type your password (according to the password requirement) here.

Confirm your password by typing it again in this field.

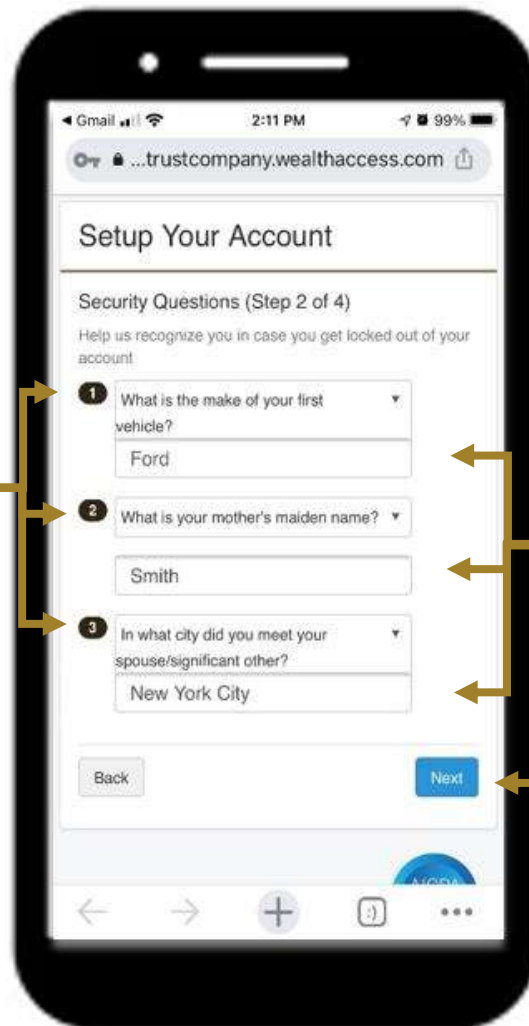
Tap the "Next" button.



# Commerce Trust Mobile App

## Security Question Setup (Step 2 of 4)

To help Commerce Trust recognize you in case you get locked out of your account, you'll be asked to create three security questions unique to you. Select a question in each of the three question field options and type in your answers that apply to your selected question.



First, use the drop-down arrow to select your three unique security questions.

Second, type in your answer to each of the security questions in this field.

Tap the "Next" button.



## Commerce Trust Mobile App

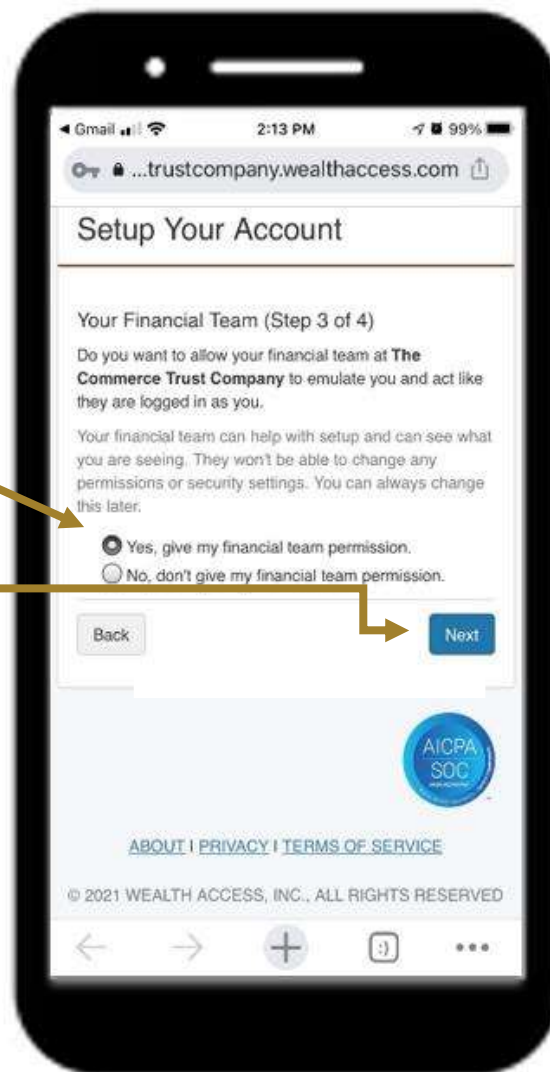
### Your Financial Team (Step 3 of 4)

You will want your Commerce Trust Financial Team to have the ability to provide support to you within the app. *Providing access does not allow your Commerce Trust Financial Team the ability to change permissions or settings.*

Choose the “Yes, give my financial team permission” selection and tap “Next”.

Choose “Yes, give my financial team permission”.

Tap the “Next” button.



### IMPORTANT

If you select “No, don’t give my financial team permission”, your financial team will not be able to assist you as easily with your support needs on the application.

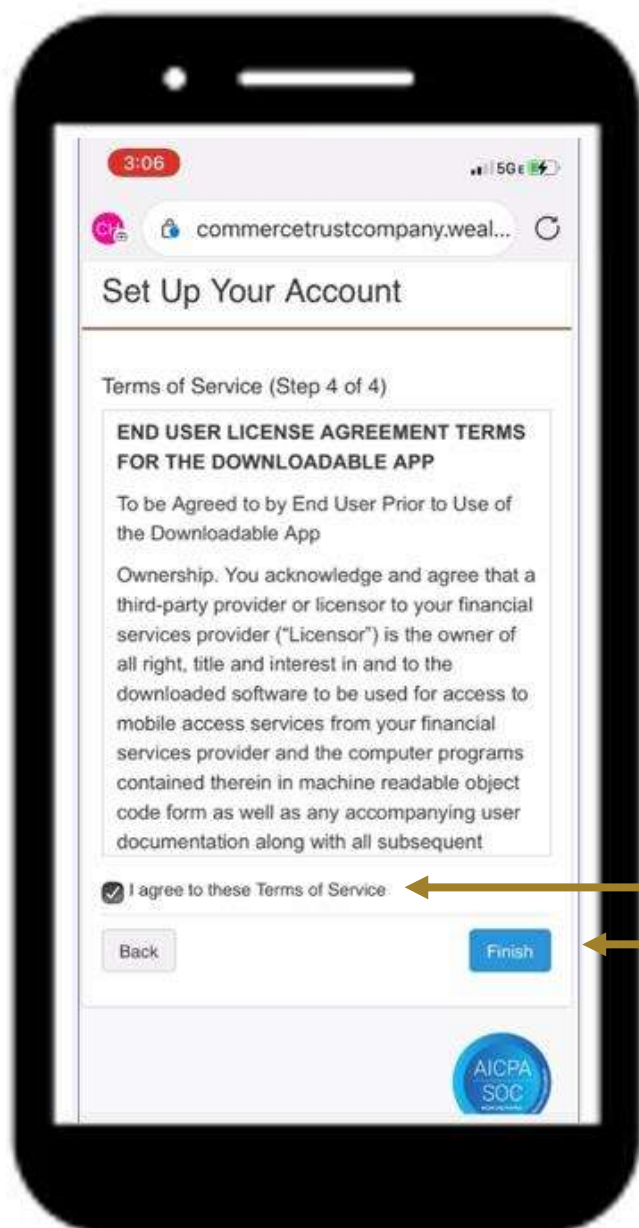
If you select “No” and later would like to allow Commerce Trust advisor access, contact Commerce Trust Technical Support at (888) 345-4366, 8:00 AM – 4:30 PM central time, Monday through Friday.



## Commerce Trust Mobile App

### Terms of Service (Step 4 of 4)

Review and agree to the End User Terms of Service by scrolling through the service terms language.



Tap the check box next to "I agree to these Terms of Service".

Tap the "Finish" button.