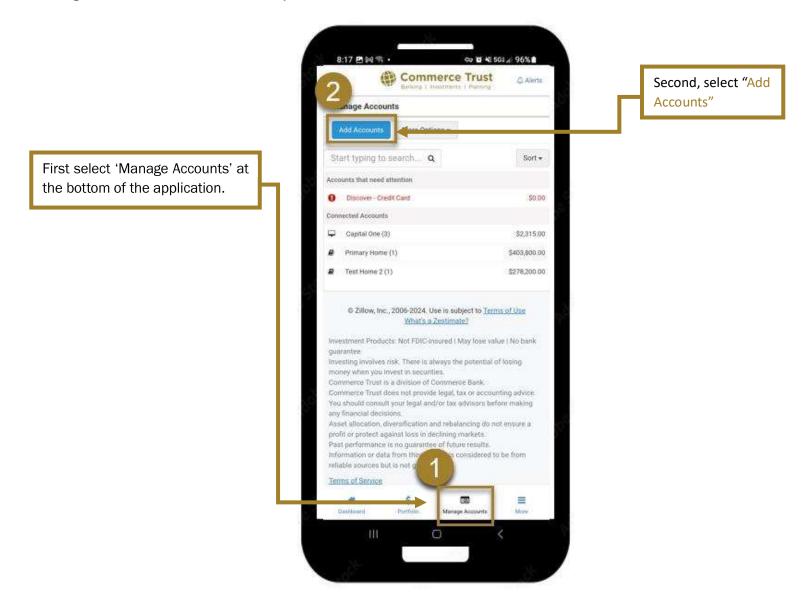
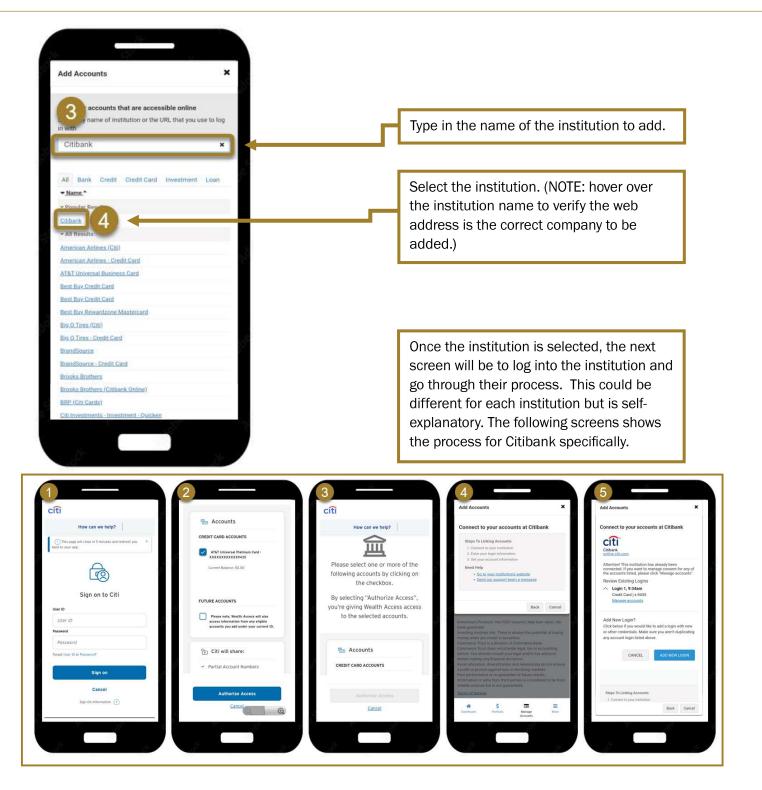
#### **Manage Accounts**

Manage accounts allows for accounts that are held outside of Commerce to be added so the larger wealth picture is attained within the CT Mobile Application. This allows more accurate reporting and allows the Financial Advisor the ability to recommend goals based on the larger picture. Without these accounts, the Financial Advisor is limited to assist with goals based on the Commerce Only accounts.





Investment Products: Not FDIC Insured | May Lose Value | No Bank Guarantee Commerce Trust is a division of Commerce Bank.





25.44

500.+

.8000

3400.000.00

Commerce Trust

More Options +

ġ.

05-2924. Use is subj

at the (f)

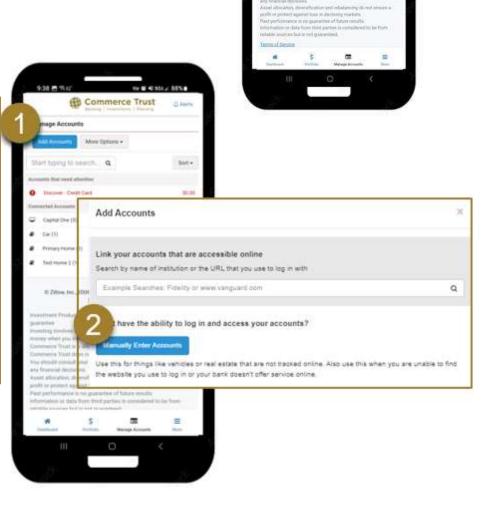
### **Commerce Trust Mobile App**

The newly added account could take up to two days to finalize and get added to the list of accounts. Once it is added, it will show up under Connected Accounts.

If accounts are not available to add automatically via the 'Add Accounts' option as described above, they can be added manually. This is typically a car loan, home loan, and assets. However, credit cards, stocks, etc. can be added this way as well.

When accounts are added via this route, updates to balances will need to be made manually.

From the Managed Accounts tab, select 'Add Accounts', then 'Manually Enter Accounts'.





Now select the type of account to be added. What you select is how your account will appear in the balance sheet and other asset allocation charts. In this example, 'Personal Property' has been selected.

Add Accounts X				
Type of Account Assumpt Details Partfalls Dependentian				
What type of account do you want to add?	This is from the D	ashboard showing	the	
# Real Estate Your residence(s) and investment properties		Manually Added Account.		
S Private Investment Inder Funds, limited partnership, and meethnoma in comparison are a fee extransition.	Balance Sheet			
A Personal Property Cars, and provely are a few examples.	Assets			
Other Account Types	Type	Total	Balanc	
Anutres	Real Estate	88.10%	\$682,000.	
Barding	Personal Property	5.8196	\$45,000.0	
Restreto	Investments	5.80%	\$44,926.	
Carl.	Banking	0.28%	\$2,180.0	
Charlothe	÷	Total Assets: \$774,107		
College & Million Deving Plans			2. 21	
Terpevin				
Dorporate Triams				
Court Accountin				
Canod				



First, update detail regarding the account. Use as much detail as desired. Name and Type of Personal Property are required; then select Next.

Second, enter information regarding classification of the account. This will help the application classify the account correctly; then select Finish.

Finally, the account has been manually added as part of the 'Connected Accounts' section of the Manage Accounts tab.

Add Accounts	×	Add Accounts	×	( Commerce	Trust () Arm
Trar of Assessed Details	Parthile Diversification	el Assessed Assessed Ge	viels Partials Diversification	Manage Accounts	
1		2	()	Add Account Meet Options +	
	int.	How do you want to o	classify this account?	Start typing to hearth . Q	Sort •
None*	199	at Assessed's Portfalle Alloc	50 C	Assessments that rank alternities	
Car	190			O Denne Cestitari	31.0
Account Number (Domana)		Alternations.		Connected Accounts	
			100 %		\$2,015.00
	- Theoreman	*		# Ger(1)	\$45,000.00
Account Balance (Eurismai)	\$ 450,000.00	Type of Alternatives		# Prenary Prints [1]	\$403,000 m
Type of Parasnal Property *		Real Adouts	*3	A Test Home 2 (1)	1278,200-00
Autorichites		A	100 %		
Notes (Dynamic)		200 - C	11111-2011	@ 280w.mc., 2004-2024. Use in and	sect to Terms of Line
		Spin Abstractives		What is a Zeational	142
Add any Additional Information and materi	To refree that	110/04/11/04/025		Investment Products Not COC Insured J A	Any True online LNA, Survey
		them Providente		quarteritien brootling brochess risk. There is always the	e petertul of hoisy
Calcul	Back Children	and a second sec		money alreat pix inwait in securities. Commerce That is a dealers of Commerce	e ben
ton shown marks would be	And in case of the local division of the loc	Candel	Balk Hinth	Commente Triat dure not provide legal, to Tou should currently your legal and/or tax	
pull is possed against may it strains	of markets	Tap performance in the party line		any financial decisions	
Faul performance in the guarantee of the industrum or task from their perform	is summarized by his lower.	Contact and an include from Wald part	tions is considered to be hard.	Atout allocation, dynamic ation and relials profit or protect against tons to declosing r	wekers.
seales are a lot a lot paratent		returns the second but in her particular		Post performance is to guarantee of future information or data from third parties is to	
Term of Junits	112 No. 1			and are a contract for a solution and an	
· · · ·	Ange Antonessa Marco	W S Telefolati Martida	Danaja fermanti mise		
III G		10 1	a (		
				m	5

