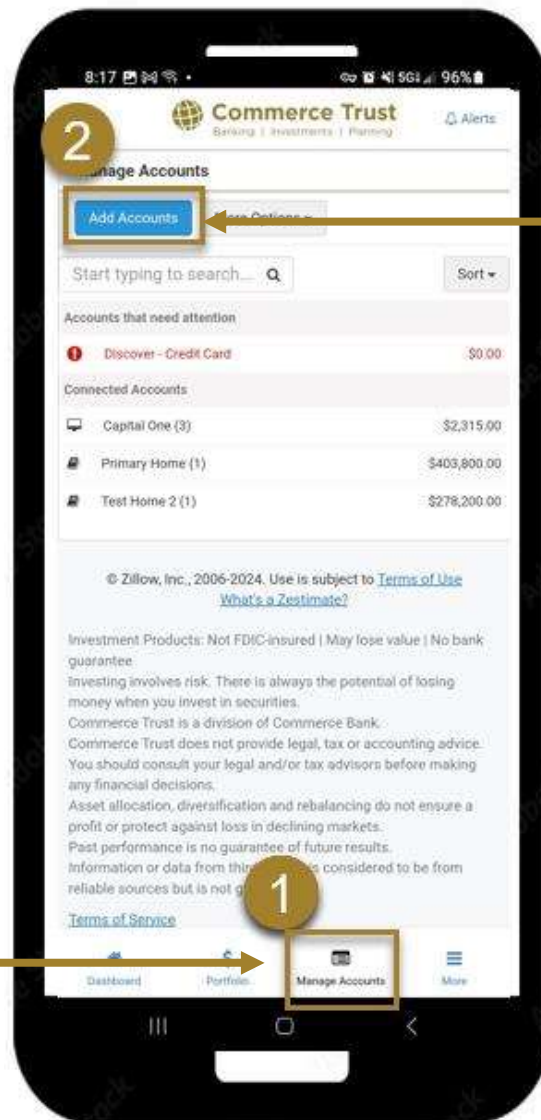


Commerce Trust Mobile App

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.

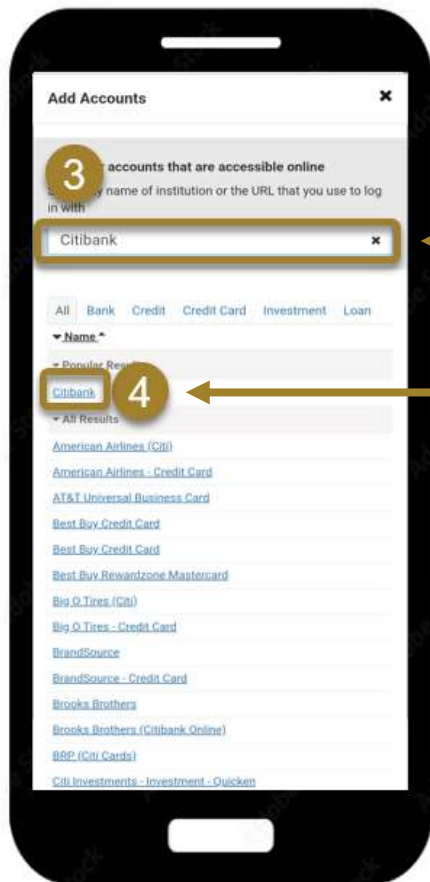


First select 'Manage Accounts' at the bottom of the application.

Second, select "Add Accounts"



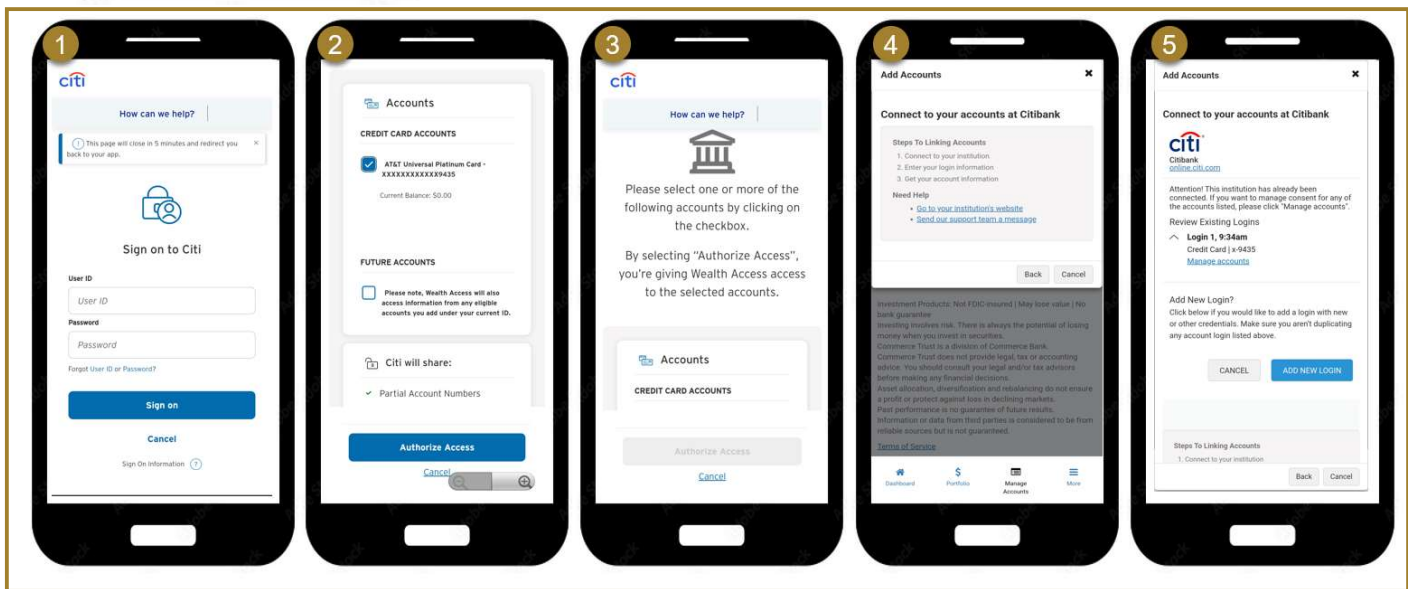
Commerce Trust Mobile App



Type in the name of the institution to add.

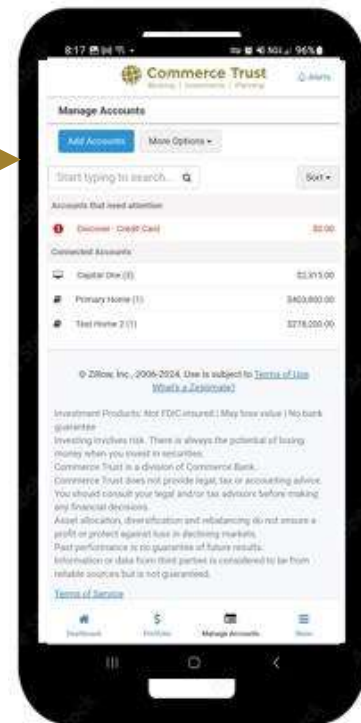
Select the institution. (NOTE: hover over the institution name to verify the web address is the correct company to be added.)

Once the institution is selected, the next screen will be to log into the institution and go through their process. This could be different for each institution but is self-explanatory. The following screens shows the process for Citibank specifically.



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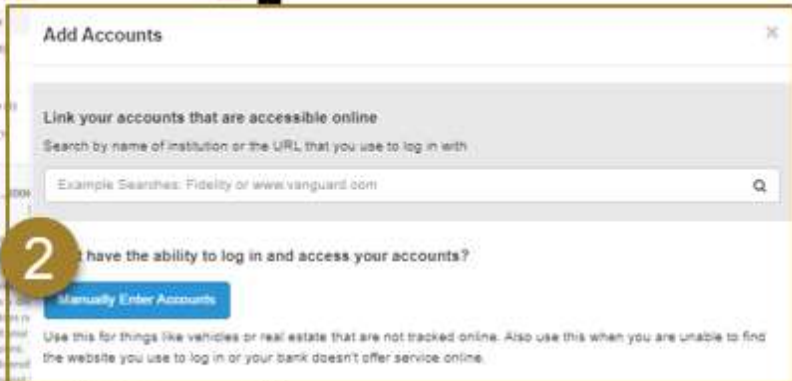
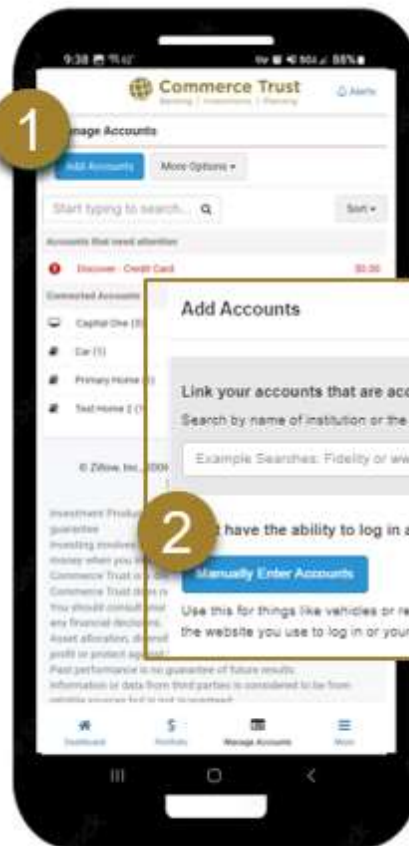
The newly added account could take up to two days to finalize and get added to the list of accounts. Once it is added, it will show up under **Connected Accounts**.



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.

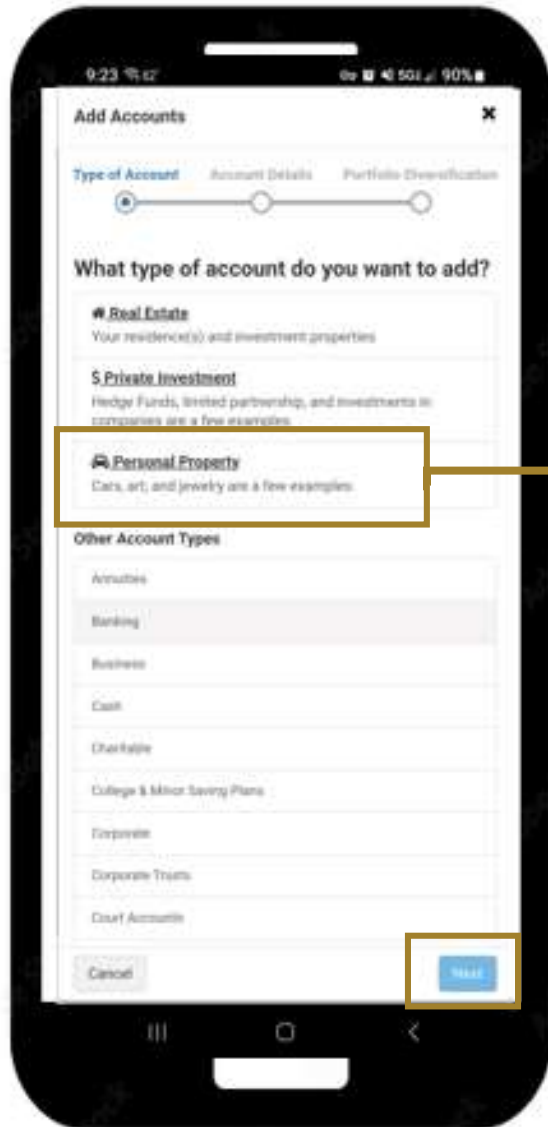
When accounts are added via this route, updates to balances will need to be made manually.

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



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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.



This is from the Dashboard showing the Manually Added Account.

Balance Sheet		
Assets		
Type	Total	Balance
Real Estate	88.10%	\$682,000.00
Personal Property	5.81%	\$45,000.00
Investments	5.80%	\$44,926.26
Banking	0.28%	\$2,180.94
		Total Assets: \$774,107.20

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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.

