



Adding a Non-Commerce Account to Your Financial Summary Screen

To add an external (non-Commerce) account to your Financial Summary Screen, go to the Financial Summary page and select "Add Account."

The Commerce Trust Company

Home Preferences Help Contact Us Sign out
Customer: AMY L. WATSON

Financial Summary Portfolio Activity Reports Tools Links

Financial Summary

Click on account number to view detail.

Financial Summary [Add Account](#) [Print](#) [Export](#)
March 25, 2008

| Account Number | Account Title | Account Type | Account Value | As Of Date | Next Step |
|---------------------------------------|---------------------|----------------------------|----------------|------------|------------|
| Cash Accounts | | | | | |
| 208009830 | WM Checking | Personal Checking | \$1.00 | 03/24/2008 | |
| Investment Accounts | | | | | |
| 1234567890 | WM CD | 1-2 Year Fixed Rate CD | \$0.01 | 03/24/2008 | |
| 1253210 | My Schwab | Brokerage | \$1,250,000.00 | 03/19/2008 | Select One |
| 2345678901 | WM IRA | 1-2 Year Fixed Rate IRA | \$0.01 | 03/24/2008 | |
| Total Assets | | | \$1,250,001.02 | | |
| Credit Accounts | | | | | |
| ****2792 | WM VISA | VISA CLASSIC | \$0.00 | 03/24/2008 | |
| 100020440001 | WM Personal Loan | Personal Loan | \$-1.00 | 03/24/2008 | |
| 20400001 | WM Home Equity Line | Home Equity Line of Credit | \$0.00 | 03/24/2008 | |
| Total Liabilities | | | \$-1.00 | | |
| Total Assets & Liabilities | | | \$1,250,000.02 | | |

Selecting an account number link may launch a newweb page.

Complete all the fields as appropriate for your account. Note that commas are not allowed in account values. Also, if you are including a link, make sure **http://** precedes the web address (see example below). Once all the fields are completed, click Submit.

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Home Preferences Help Contact Us Sign out

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Financial Summary Add Account March 25, 2008

Enter the account information and select Submit to update the account on the Financial Summary.

Required Fields

Account Category: Investment Accounts (Used to group accounts.)

Account Number: 111222333 (Number associated with account. 36 characters)

Account Title: Non-Commerce Account (Name or title of the account. 36 characters)

Account Type: Agency (e.g. Checking, Savings, Mortgage. 36 characters)

Account Value: 1000000 (Dollar value of the account. 17 characters)

As of Date: 03/25/2008 (Date of account value.)

Optional Fields


Link: http://schwab.com (URL 100 characters)

Expiration Date: (Date account should be removed from display.)





The account will now appear on your Financial Summary screen. You can modify or delete this information at any time by using the "Next Step" drop-down list.



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 Customer: AMY L WATSON

IC: 43.93 -0.09 -0.20% (IBM) INTERNATIONAL BUSINESS MACHINES (IBM) CORP. 117.96 -1.10 -0.92% (COMP) NASDAQ COMPOSITE 2,341.66 +14.91 +0.64% (0)

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Financial Summary
 Click on account number to view detail. [Add Account](#) [Print](#) [Export](#)
 March 25, 2008

| Account Number | Account Title | Account Type | Account Value | As Of Date | Next Step |
|---------------------------------------|----------------------|----------------------------|-----------------------|------------|------------|
| Cash Accounts | | | | | |
| 208009830 | WM Checking | Personal Checking | \$1.00 | 03/24/2008 | |
| Investment Accounts | | | | | |
| 111222333 | Non-Commerce Account | Agency | \$1,000,000.00 | 03/25/2008 | Select One |
| 1234567890 | WM CD | 1-2 Year Fixed Rate CD | \$0.01 | 03/24/2008 | Select One |
| 1253210 | My Schwab | Brokerage | \$1,250,000.00 | 03/19/2008 | Modify |
| 2345678901 | WM IRA | 1-2 Year Fixed Rate IRA | \$0.01 | 03/24/2008 | Delete |
| Total Assets | | | \$2,250,001.02 | | |
| Credit Accounts | | | | | |
| ****2792 | WM VISA | VISA CLASSIC | \$0.00 | 03/24/2008 | |
| 100020440001 | WM Personal Loan | Personal Loan | \$-1.00 | 03/24/2008 | |
| 20400001 | WM Home Equity Line | Home Equity Line of Credit | \$0.00 | 03/24/2008 | |
| Total Liabilities | | | \$-1.00 | | |
| Total Assets & Liabilities | | | \$2,250,000.02 | | |