The Commerce Trust Company

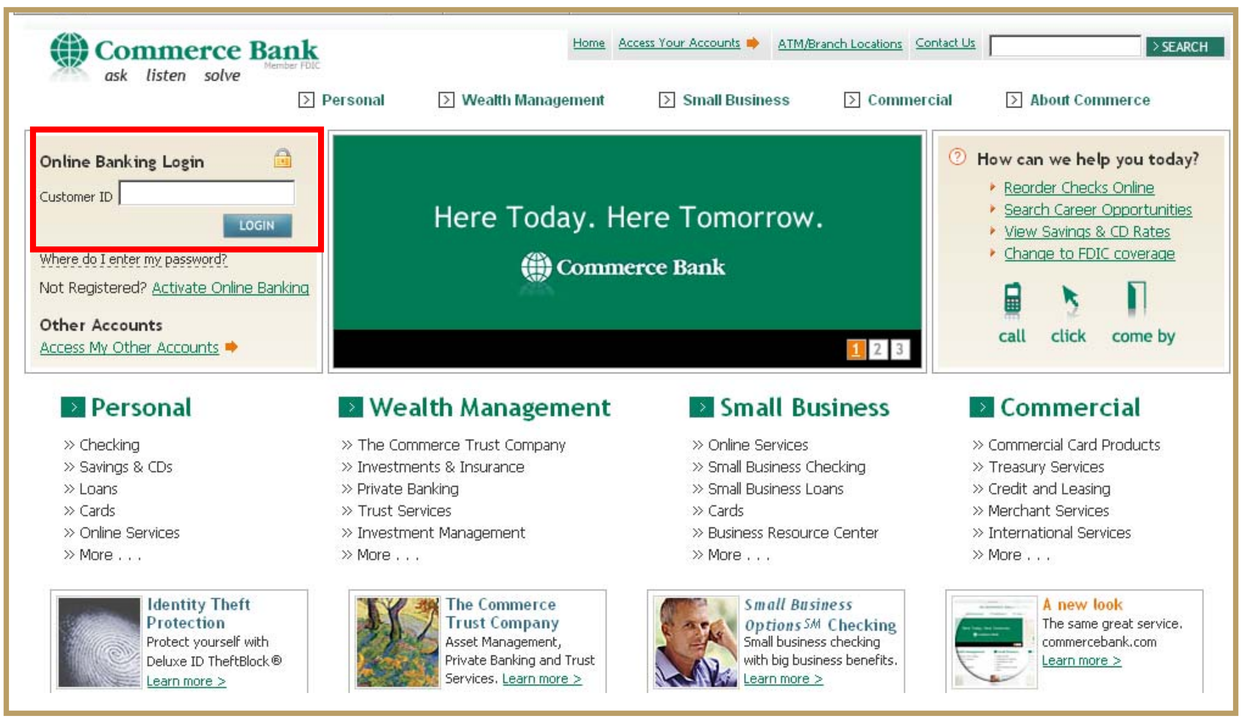
WEALTH MANAGER

Online Web Access User Guide

Step 1

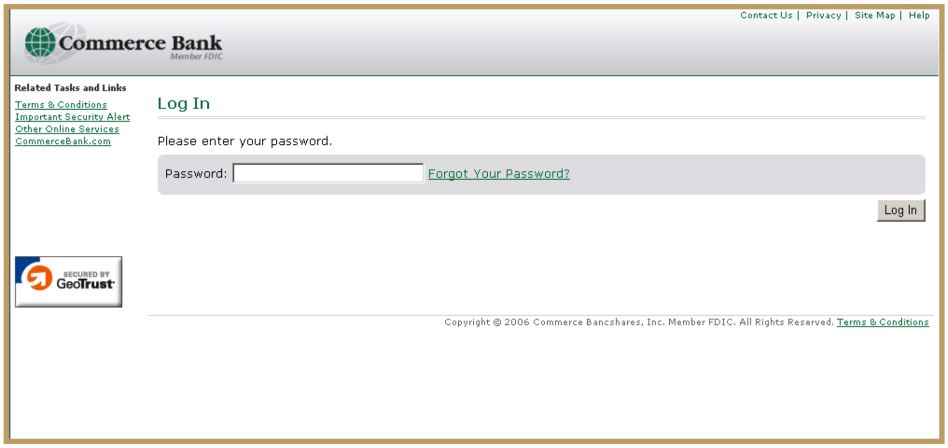
Logging On

Once you have been set up as a user by the Commerce Trust Company Technical Support staff, you are ready to log on and view your account(s). You will need the access ID and temporary password that was provided to you via email. When you log on for the first time, you will be prompted to enroll in Secure Authentication. Secure Authentication Sign On is a service to help protect you from fraudulent online activity. At the end of this process you will be required to enter a new password. Your password must be at least eight characters, and may contain both alpha and numeric characters. Your password cannot be reused at any time. Start now by going to Commerce Bank.com and entering your Customer ID provided to you via email in the upper left. Then select **Login.**

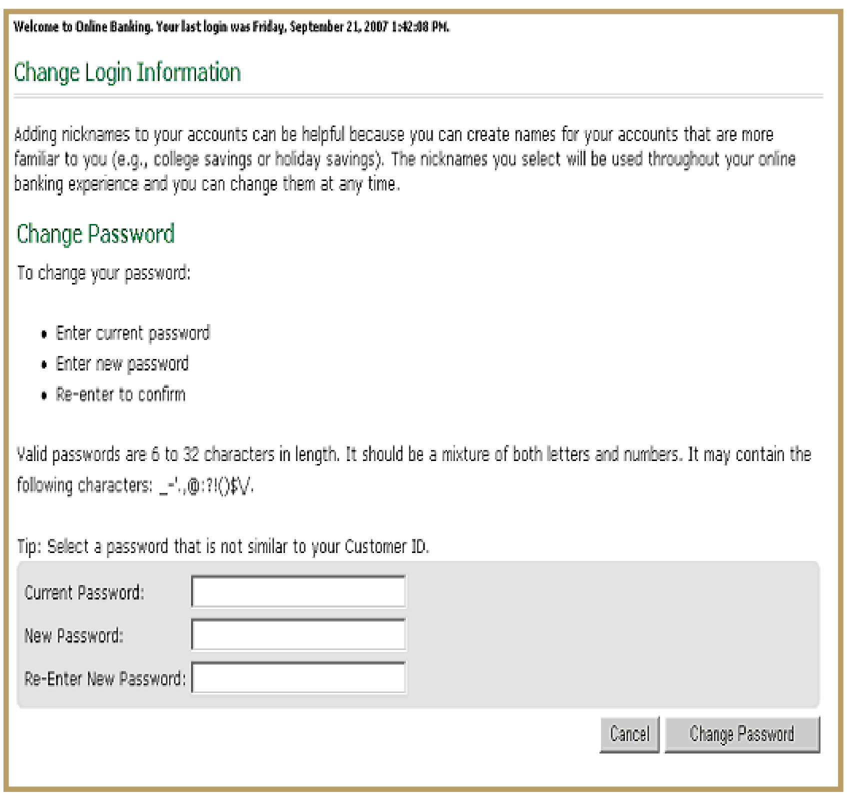


Log In

If this is the first time you are logging onto Wealth Manager, you will be presented with a page describing the steps necessary to complete Secure Sign on.



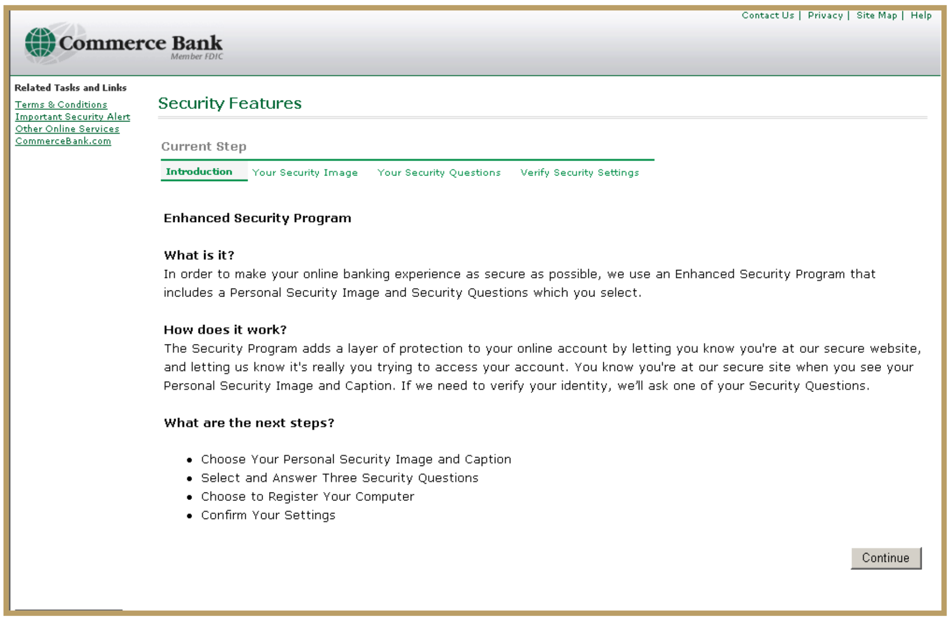
Change Login Information



Setting Up Secure Sign On

Your Secure Sign On setup will be completed in four easy steps. First, select a picture and enter a phrase you want to use as confirmation that you are on our website. Then, establish confirmation questions that help us ensure that only authorized individuals are accessing your account information.

Security Features



Registering Your Computer

Next, decide if you want to register the computer you are currently using as an authorized location to access your account information.

Confirm User Name and Email Address

Last, confirm your user name and enter an email address.

Once you have completed these steps, access to Wealth Manager is only a step away. Next, confirm the secure sign on information and enter a new password. Finally, select **Go to Wealth Manager Online** to access your account information.

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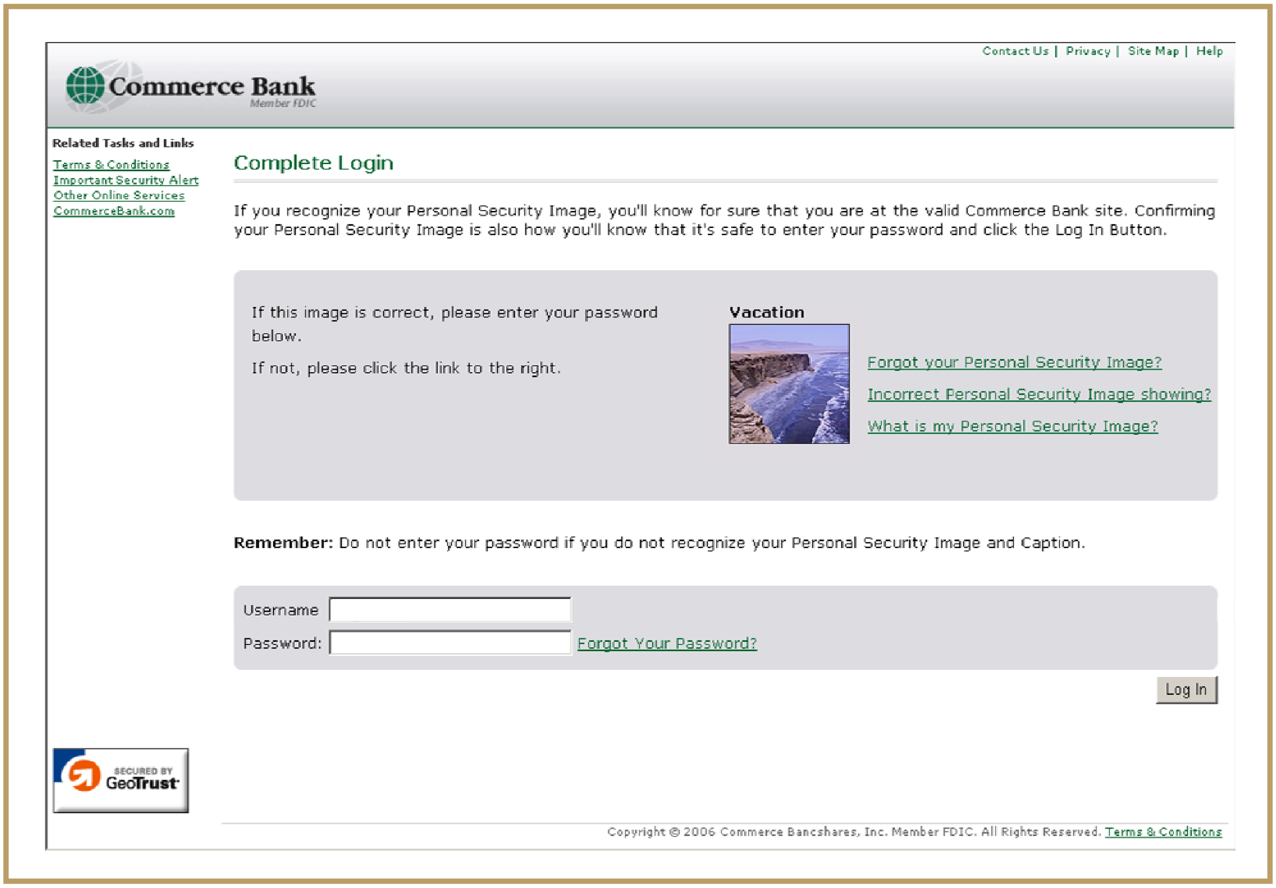
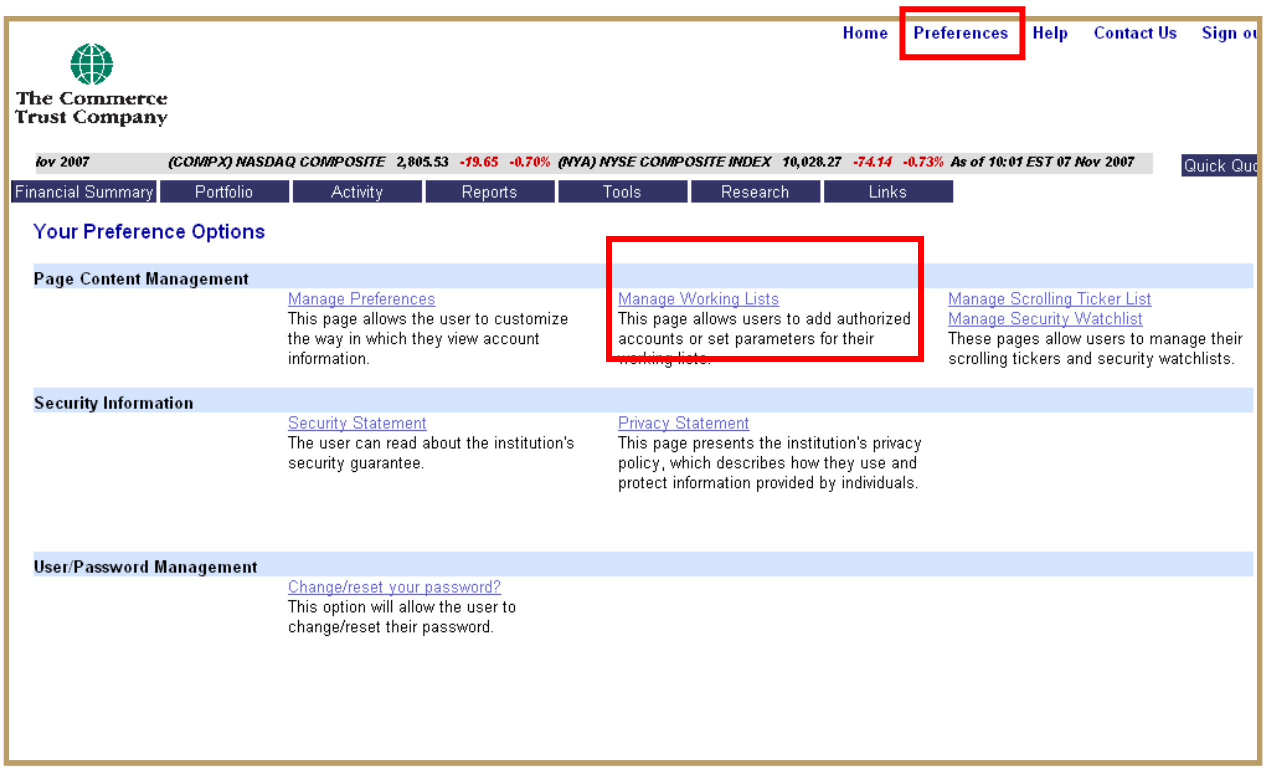


Once you have completed the Secure Authentication setup, your chosen security image and phrase will be displayed each time you log in to Wealth Manager and your password will be requested. If your security image and phrase are not presented, please contact Commerce Trust Company Technical Support via e-mail at CTCTechSupport@CommerceBank.com or by phone at 1-877-605-7490 before proceeding.

Step 2

Creating an Account List:

When you log on for the first time, you may be prompted to create your account list(s). This list is used throughout the site for quick and easy access to viewing account information. You can name the list(s) anything you like. If you have one account, you will only have one list; however, if you have more then one account, you may want to create multiple lists. Click on the word **Preferences** in the upper right section of the screen and use **Manage Working Lists** (see example below):



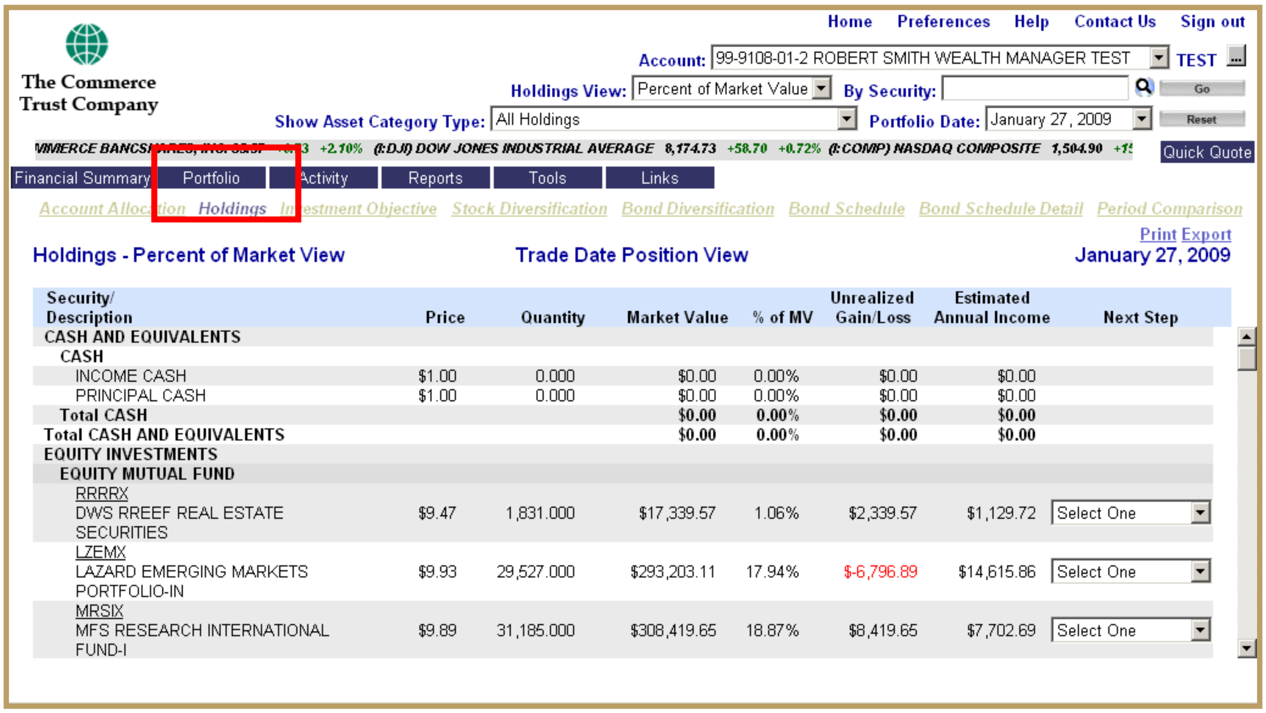
Select an account from the list of Authorized Accounts, and click Add. If you want to add all of the accounts to your list, highlight all of the authorized accounts and click Add.

If an account is not currently displayed, click "Next" to view additional authorized accounts, or you may enter the account number in the Starting Account field and click "Go" to display the account at the top of the list. ***There is a maximum of 50 accounts per working list.***

Step 3

Navigating your Account

To view the portfolio in more detail, click on any one of the navigation buttons and select one of the page options from the drop-down selection list.



Once you view a specific page under a specific Navigation feature (click on the **Portfolio** button along the top for example), you may select any of the links associated with that feature to quickly and easily change your view of information.

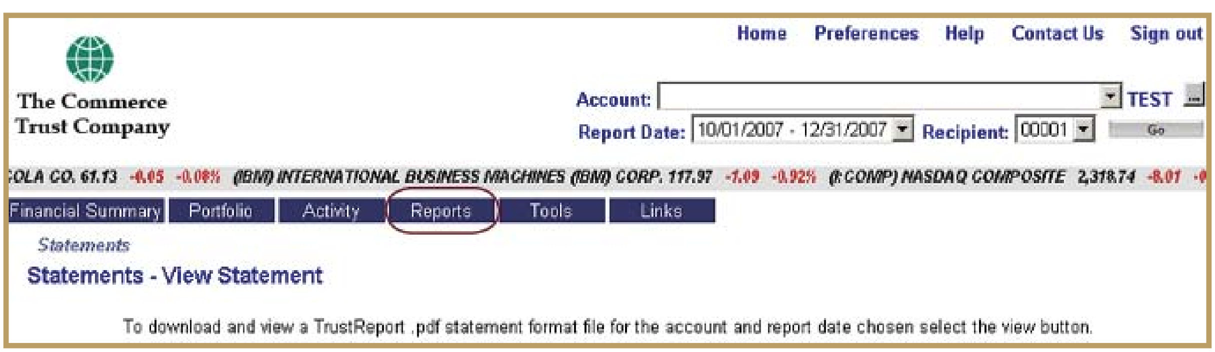
On several pages you are also presented with Next Step options. Simply select one of the options from the **Next Step** list (the far right hand column on the screen) and a new page will display. Next Step options allow for quick and easy navigation to view information or to take action.

Step 4

Viewing your Statement

From here you have quick online access to statements. Click **Reports** and select **Statements** from the drop-down selection list. Select the statement date (from the drop down choices next to Report Date) you wish to view and click Go.

Next, select **View Statements**. The statement is then available for viewing and/or printing in a PDF format. Adobe© Acrobat Reader is required to view the statement in a PDF format. This software can be downloaded at www.adobe.com.

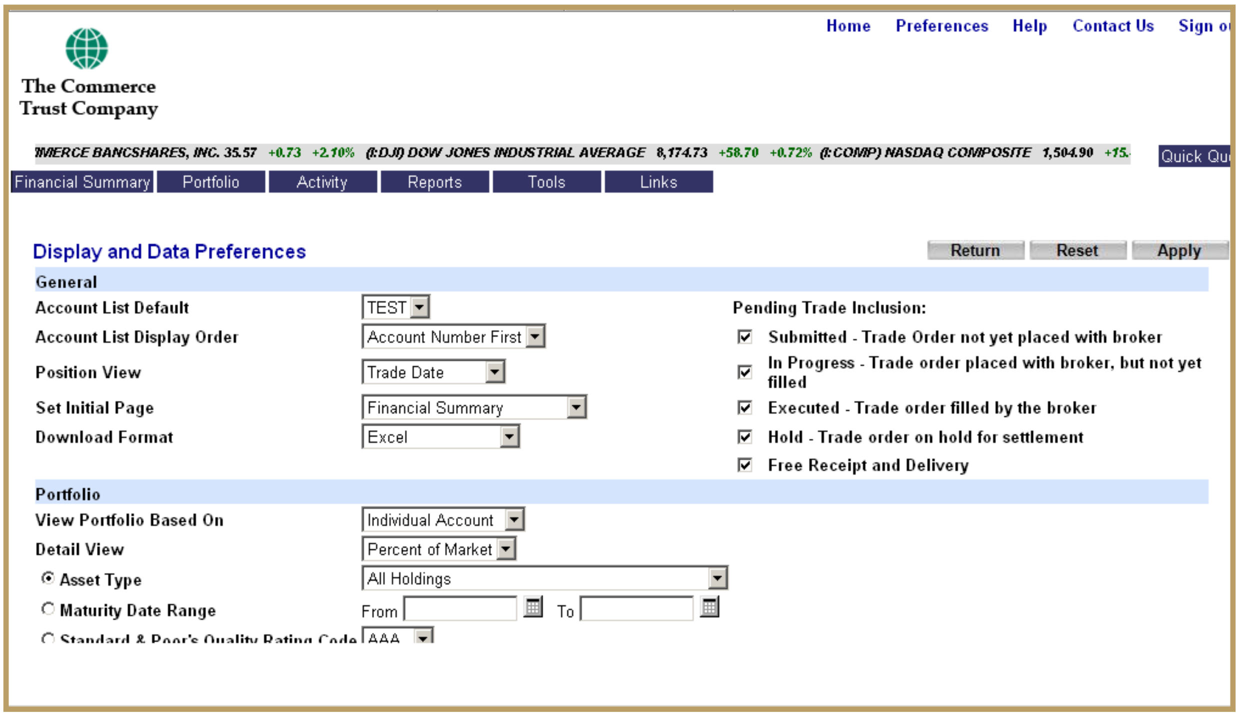


To print a statement, select the print icon from the Adobe tool bar. If you would like to retain a copy for a permanent record, simply use the "Save a Copy" icon and save it to a file or disk.

STEP 5

Personalizing your Preferences

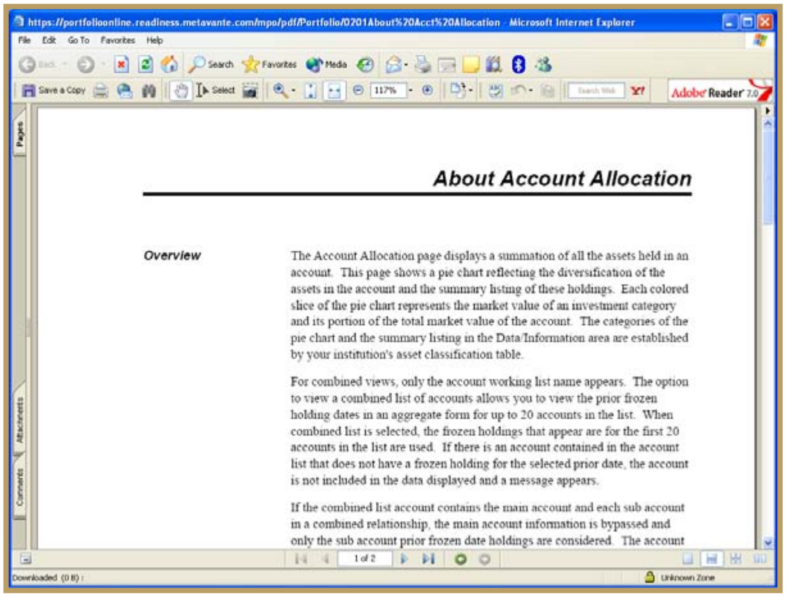
Through the use of filters, you are able to view information in a variety of ways on many pages; however, you can personalize the information displayed by changing any of the fields on the Preferences page.
To access Preferences, select Preferences in the banner area and then select Manage Preferences. ***If you make any changes, you must click Apply for your changes to be saved.***



Step 6

Obtaining Additional Help

Help is available at any time. Click Help from the banner area and a new page will launch. Select the topic you are interested in learning. The topic is available for viewing and/or printing in a PDF format.



If you have any questions regarding Wealth Manager please contact The Commerce Trust Company Technical Support at 1-877-605-7490.