

FAQs

How do I enroll in Trust Client Portal?

Please see the “Self-Registration” portion of this brochure for more details or contact your account administrator to request access.

What should I do if I do not recognize my sign in challenge questions or picture?

Most likely you have entered the wrong user name. User ID is case sensitive. If you are confident it is correct and you have not used the incorrect case, please contact the Trust Team for assistance.

Can I watch the Guided Tour again?

Yes. It is always available from the help icon (?) in the topright corner.

How do I enroll for Online Statements?

See the Online Statement Sign-Up portion of this brochure for details.

Is Trust Client Portal compatible with accounting software?

Yes. You can download your information from the Holdings tab by clicking on Download. This produces an Excel version of your report. You can also print a PDF version with the Print feature.

Can I change my default account view?

Yes. See the user guide in the Help Menu (?) for details. Some reports are unavailable by default. Please call the Trust Team if you would like more flexibility in the reports you see.



Forgot Password?

Clicking this link on the login page will send an automated email to you, containing a Password Token. Copy and paste this temporary password from the email to the **Forgot Password** Screen, then enter and confirm a new password.



Our TrustTrak mobile app is available for Apple and Android devices. See your manufacturers App store.

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Trust Client Portal Reference Guide

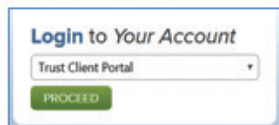


*Financial Solutions from
Advisors You Trust*

Welcome to Trust Client Portal (TCP)

Access your Trust accounts when it's convenient for you. The design gives you full function from a desktop, mobile phone, or tablet using any browser.

Logging On



You may already have an existing **User Name**, or you may have received a new one. Login by visiting www.snbt.com. Look for the main login area on the upper left side of the homepage. Click the drop down arrow and choose "**Trust Client Portal**", then click the green **Proceed** button.

Enter your **User Name** on the **Sign in to your account** screen and click "**Next**". When using a device you own, click the **Register it** option to avoid having to answer security questions each time you login.



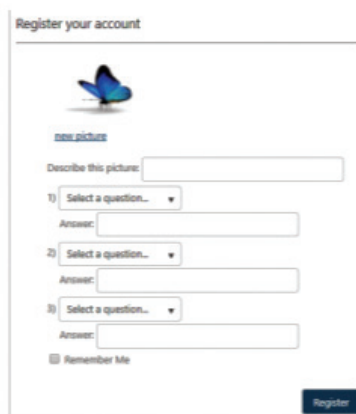
Using Client Portal

If this is your first sign in attempt, you will be presented with a password screen where you need to create a new password. Use the ID we provided to you in the **Password Token** box, then enter and confirm a new password.



When signing in for the first time you must **register** your access by filling in all the fields below.

Select a picture and describe it in a way you will remember each time you visit. Choose three challenge questions only you could answer correctly. Your answers are **case sensitive**. For your protection, one of the questions you select during registration will be presented on the **Sign In Challenge** screen if TCP doesn't recognize the device you are using. This is why you should **Register** your device if it is one you own.



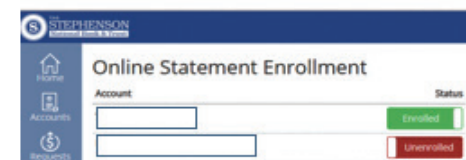
Online Statement Sign-Up

Once you are logged on to the TCP, you should take these steps to start receiving electronic statements. To sign up, select **User Profile/ Online Statement Enrollment** from the icons and drop-down lists in the top right corner of the dashboard page.



First, select the accounts to enroll in the **Status** column, then click Save.

The enrollment process allows you to choose the accounts to enroll for online statements and notifies you of your enrollment.



You will receive an email notification when you successfully complete enrollment for online statements and an additional email when your new statements are available online for viewing.

Terms & Conditions

When you sign in for the first time, you are presented with the **Terms & Conditions** for using the site. These are legal provisions that pertain to proper use of the Trust Client Portal. You must accept these terms to gain access to the website.