

Client Point Quick Start Guide


Accessing Your Account

- The Client Point web address can be found at our website, www.countryclubtrust.com, under the "Login to your accounts section" in the upper right corner.

Initial Client Point Login

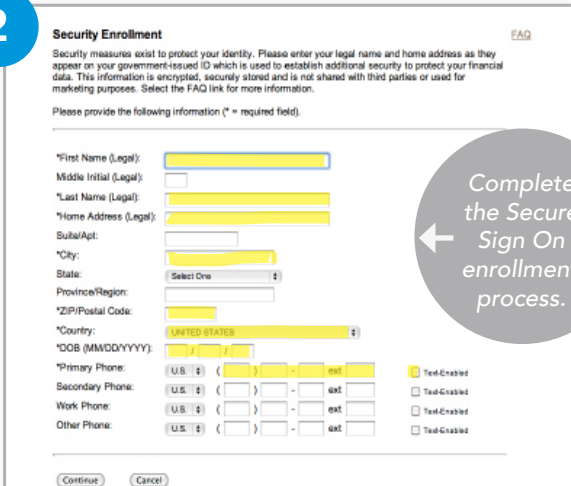
The first time you log in you'll be prompted to enroll in **Secure Sign On**. Secure Sign On is a service to help protect you from fraudulent online activity. During the enrollment process, you will be asked to supply some personal information and create a new password.

1



The screenshot shows the Country Club Trust Company Client Point login page. At the top is the company logo and name. Below it, a blue link says "Log in with your current Portfolio Online Access ID and Password." The main heading is "Country Club Trust Company Client Point". A "Welcome to Client Point!" message is followed by a prompt to enter the Access ID and Password. There are input fields for both, a "Forgot your password?" link, and a "Sign In" button. On the right, there is a "Your privacy is our responsibility." section with links to learn more, a note about using Internet Explorer 8, and a Norton Secured logo.

2



The screenshot shows the "Security Enrollment" form. It includes a heading, a paragraph explaining the purpose of the security measures, and a list of fields to be completed: First Name (Legal), Middle Initial (Legal), Last Name (Legal), Home Address (Legal), Suite/Apt, City, State (dropdown), Province/Region, ZIP/Postal Code, Country (dropdown), DOB (MM/DD/YYYY), Primary Phone, Secondary Phone, Work Phone, and Other Phone. Each phone field has a dropdown for country and a checkbox for "Text Enabled". There are "Continue" and "Cancel" buttons at the bottom.

Complete the Secure Sign On enrollment process.

3



The screenshot shows the "New Password Required" form. It includes a heading, a paragraph explaining the password requirements, and two input fields: "New Password:" and "Confirm Password:". Below the "New Password:" field, there is a list of requirements: 1) Numeric characters, 2) Uppercase letters, 3) Lowercase letters, and 4) Special characters (ex - !, ., #, @). There are "Enroll" and "Cancel" buttons at the bottom.

After your security enrollment, you will be prompted to enter a new password. Please note the password requirements, and then click Enroll.

Client Agreement

You will be prompted to accept the terms and conditions of use of the site. Selecting **I accept the terms of the agreement** completes the Log In process, and provides access to the site and your account information. If you want to review the terms, select the link provided to view the details. If you choose not to agree by selecting **I decline the terms of the agreement**, you will not gain access and will be reverted to the initial Log In page.

Accept the Terms and Conditions of the Agreement below to sign in

Please select from the options below, and click "Continue".

☒ I accept the terms of the agreement

☐ I decline the terms of the agreement

[View the Terms and Conditions of the Online Client Agreement](#)

This version of the Online Client Agreement was last updated on:

Subsequent Client Login

Subsequent logins are fast and easy when accessing the site from the same device. During the Log In process, we not only validate your access ID and password, we also analyze numerous elements regarding your device to ensure your identity. When we experience a change in your device, you may be required to complete an additional step in the Log In process by entering a one-time security code to validate your identity or by opting to answer challenge questions. The one-time security code can be delivered through a **telephone call** or **text message**. If you do not have access to a telephone, you can **opt to answer challenge questions**.