TheBANK of Edwardsville℠ | Wealth Management

Client Point

www.4thebank/wealth-management

Anywhere you can access the Internet, you can access your Wealth Management account at TheBANK…24 hours a day, 7 days a week. Client Point gives you access to a complete review of your investment portfolio:

- Account Summary… displays your portfolio
- Investment Details… individual holding information such as units, cost basis, and market value
- Transaction Activity… summary of all activity for a specific period of time – one click to underlying detail
- Equity and Fixed Income Analysis… sector breakdown and maturity schedules
- Pending Trades… review pending stock and bond trades
- Real Time Stock Quotes
- Online Statements
- Quicken download

*Access your Wealth Management account at TheBANK FREE online at **www.4thebank/wealth-management***

Getting Started Once you have completed and returned this application, you will receive a welcome letter with your Client Point Access ID. For your protection, a few days later we will mail your Password under separate cover. You will need both the Access ID and Password to access your account.

Security Client Point is an Internet Banking service with built-in security features to assure your account information remains confidential.

- Your account information is encrypted when it travels between your computer and Client Point.
- You have the option to change your Password as often as you feel appropriate.
- Secure Sign On offers additional features to allow you to be sure you are connected to Client Point.

Online Statements You can choose to view your statements online. No more paper or waiting for your statements to arrive in the mail. We'll email you when your statement is ready and you can simply view it on Client Point. You will also have the ability to print your statements or save a copy to your hard drive, CD, etc.

Questions or Comments?

Contact Wealth Management at TheBANK:
618/659-6242 or invest@4thebank.com

Please print and mail or fax to:

Mail
TheBANK of Edwardsville
Attention: Wealth Management
330 West Vandalia
Edwardsville, IL 62025

Fax
618-659-4589 • Attn: WM-Operations

www.4thebank.com/media/81350/ClientPointApplication.pdf

Please select the following services in which you would like to enroll:

☐ **Client Point** Internet access to your Wealth Management account at TheBANK – 24 hours a day, 7 days a week.

☐ **Electronic Document Delivery** *(Client Point access is required)* I authorize TheBANK of Edwardsville to provide an electronic Statement on the account(s) listed below. I understand that I will no longer receive a paper copy of my Statement, and that on my Statement cycle TheBANK of Edwardsville will send me an email notifying me when it is available for viewing on Client Point, which can be accessed through www.4thebank/wealth-management.com. I understand that I have the ability to retain a copy of my electronic Statement by printing it or saving a copy to my hard drive, CD, etc. I also understand that my electronic Statement will be available for viewing or download for a limited amount of time after the Statement cycle date and that it is my responsibility to notify TheBANK of Edwardsville of any changes to my email address. By submitting this form, I understand that I am obligated to review my Statement for errors or omissions.

I also authorize TheBANK of Edwardsville to provide an electronic Privacy Pledge and understand that I will no longer receive a copy of the Privacy Pledge in the mail. In addition, TheBANK may provide other correspondence or notifications electronically that may be required for these account(s).

To request a paper copy of your Statement or Privacy Pledge, to switch from electronic to paper documentation, or to update your email address, please contact Wealth Management at TheBANK at 618/659-6242 or at invest@4TheBANK.com. You may receive a few more printed Statements and a Privacy Pledge before your electronic documentation delivery begins.

Please complete the following: *All information will remain confidential. (Please print)*

Applicant ______________________________ Company Name ______________________________
First M.I. Last

Address ____
City State Zip

Phone Number ______________________________ E-Mail Address ______________________________
(Required for Online Statement)

Social Security or Tax ID Number (Applicant)

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List of your accounts you would like to access through Client Point

______________________________ ______________________________
Account Number Account Number

______________________________ ______________________________
Account Number Account Number

If you would like additional parties to access your accounts, please provide us with the following information on each person:

Name ____
First M.I. Last

Address ____
City State Zip

Phone Number ______________________________ E-Mail Address ______________________________

Name ____
First M.I. Last

Address ____
City State Zip

Phone Number ______________________________ E-Mail Address ______________________________

Authorized Signature:

____
Authorized Signature (Applicant) Date

For Bank Use Only

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Employee Signature