

WEALTH MANAGER – YOUR HOMEPAGE

Welcome to Your Updated Wealth Manager Homepage!

You can quickly access an overview of your accounts at Commerce Trust Company with the new homepage. Log in to Wealth Manager to see a preview of your Financial Summary, Portfolio Allocation, Projected Income and Year-to-Date Summary on the homepage. Click on the preview to go to the detailed page for more information.

You can customize your homepage view by grouping accounts. Go to the Group Accounts menu in the Navigation Bar then Group Accounts menu in the Filter to setup or modify your view.

The screenshot shows the Commerce Trust Company Wealth Manager homepage. The interface includes a navigation bar at the top with tabs for Dashboard, Financial Summary, Portfolio, Activity, Investment, Tools, Lists, and Group Accounts. The main content area is divided into several sections: Financial Summary (listing accounts and balances), Portfolio Allocation (a donut chart showing asset distribution by category), Projected Income (a bar chart showing income projections), and Year to Date Summary (a table of activity). A red bracket on the right side of the screenshot groups the Navigation Bar, Filter, and Features sections.

Category	Market Value
CASH AND EQUIVALENTS	\$349,220.38
EQUITY INVESTMENTS	\$20,227,121.44
FIXED INCOME INVESTMENTS	\$10,970,954.50
ALTERNATIVE INVESTMENTS	\$4,414.50
HYBRIDS	\$7,916,182.60
REAL ESTATE AND MINERALS	\$887,581.23
CLOSELY HELD	\$5,841,154.83
MISCELLANEOUS	\$5,841,154.83
Total	\$121,968,269.84

Category	Total Cash
Year-to-Date Activity	\$0.00
Net Trade Activity	\$0.00
Total Withdrawal Activity	\$100.00
Net Realized Gain/Loss Activity	\$100.00

Homepage Features

Financial Summary – Provides a quick balance summary for all your Commerce accounts.

Portfolio Allocation - Provides an aggregated view of the portfolio for all accounts in the active group depicted in a donut graph.

Projected Income - Provides projected income for the active group of accounts.

Year to Date Summary - It shows transactions for the current year based on high level categorization.

Important Messages – Provides an area to view important messages from Commerce Trust Company.

Commerce Trust Company is a division of Commerce Bank

