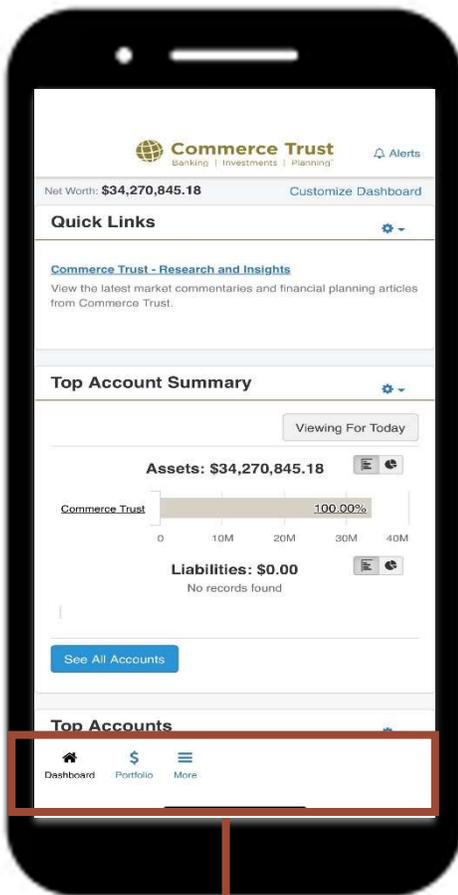


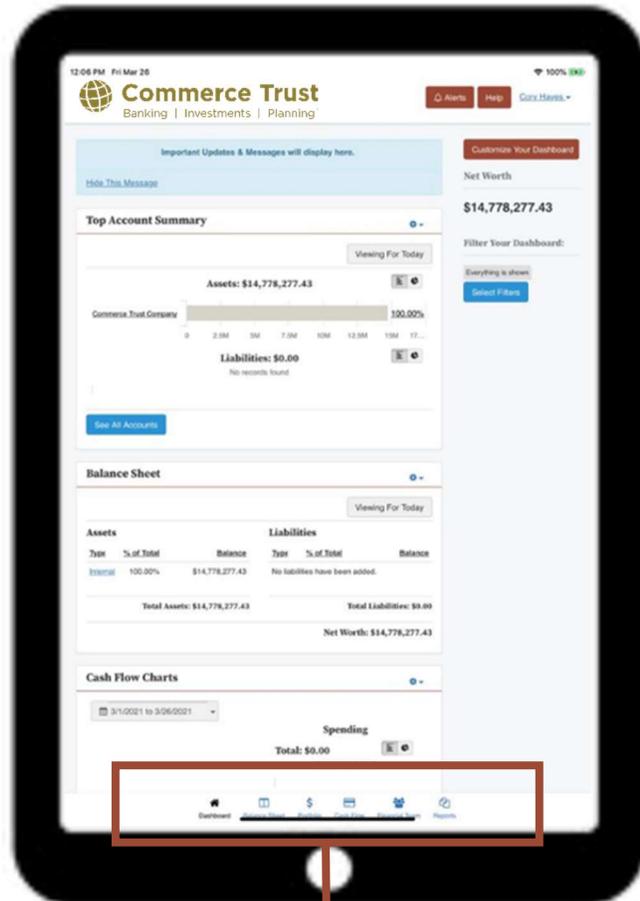
# Commerce Trust Mobile App

Last Revised: 9/19/2023

## YOUR COMMERCE TRUST MOBILE APP



Phone Navigation Icons



Tablet Navigation Icons



At the bottom of the device screen, you'll see a variety of icons that navigate you to view, monitor and manage your account information.

## NAVIGATING THE COMMERCE TRUST MOBILE APP

**NOTE:** The navigation icon options differ slightly between the phone and tablet. The Commerce Trust Mobile App offers the same features and functions regardless of your device. However, you'll see a slightly consolidated version of the navigation icon ribbon on the mobile device. You will find the "Balance Sheet", "Financial Team" and "Reports" icons in the "More" icon on your phone's app.

### Using the Navigation Icons

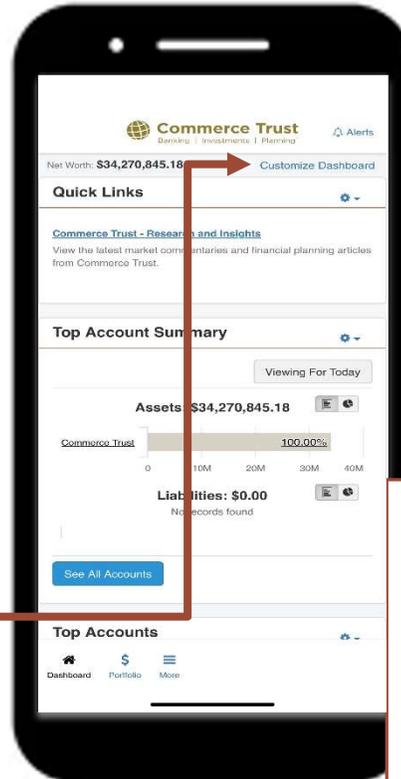
Using the navigation icons to view account information in the mobile app is intuitive. Within each icon, there is additional functionality.



#### Dashboard

Once you log into the app, the default landing page is the Dashboard navigation tab. This view provides at-a-glance information on a variety of account items including: *Net Worth*, *Top Account Summary*, *Balance Sheet information*, *Cash Flow Charts*, *Account Balance Changes Over Time*, *Top Holdings*, *Portfolio Diversification* and *Trading Activity*.

The Dashboard view is customizable by tapping on the "Customize Dashboard" link. Add or remove categories. Change the sequence order by dragging and dropping the item category box.



Name	Balance	
1649 Adrian Rd Burlingame Ca at Commerce Trust Company: Roberta Smith Wealth Mana...	\$2,590,909.09	Details
John Smith Land Lot #777 Test Cusip at Commerce Trust Company: Roberta Smith Wealth Mana...	\$777,777.77	Details
Transdigm Group Inc at Commerce Trust Company: Roberta Smith Wealth Mana...	\$579,180.00	Details
Ferguson Mo Reorganized S/D #R-2 Build America Bonds Taxable Series B General Obligation Unlimited 5.1% Due 05/01/29 Dated 10/06/10 Sinkable Callable 05/01/20 at Commerce Trust Company: Roberta Smith Wealth Mana...	\$500,000.00	Details



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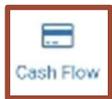
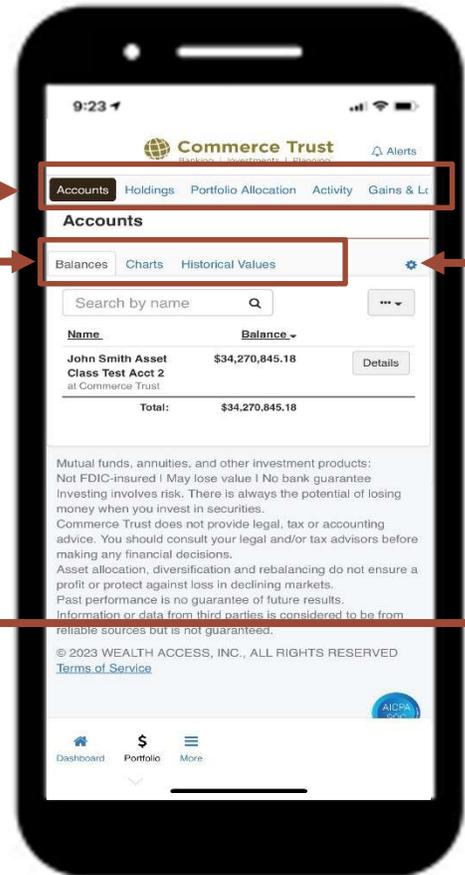


## Portfolio

View your portfolio holdings by name and balance in this navigation icon, along with diversification charts and trading activity.

**Function Tabs** in the upper left corner of each navigation icon allow you to access more detailed account information. Features include the ability to view balance, account and holding information in various chart formats, adjustable historical data exists, as well as detailed trading and transactional information.

Use the **Gear Button** to filter content or use the search functionality to easily locate items.



## Cash Flow

Understanding your cash flow position is as easy as adding a few pieces of account information so we can pull all your transactions together and summarize your cash flow. Helping you:

- See how your income and spending fluctuates from month to month
- Better understand your spending habits.
- Track how your cash flow changes over time



## Balance Sheet

Understanding your net worth starts with your personal balance sheet. The functionality in the tab allows for you to view your assets, liability, and net worth.



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# Commerce Trust Mobile App

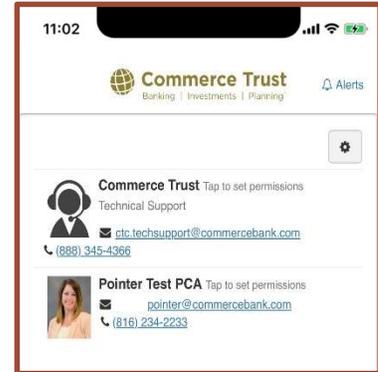
Last Revised: 9/19/2023



## Financial Team

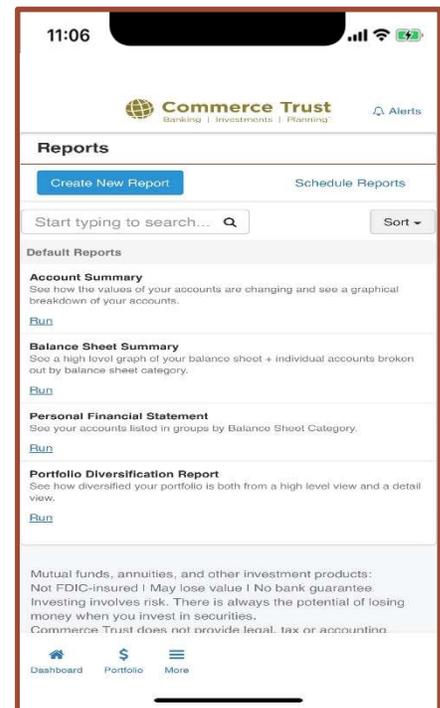
Access to your Commerce Trust team is important. Here you'll find contact information for Commerce Trust Technical Support when you have unanswered questions or need help with the app.

You'll also see contact information for those on the Commerce Trust Wealth Management team assigned to ensure your financial success.



## Reports

Need yet a deeper dive into account information and wish to view and receive the information in report form? This navigation icon allows you to run a report summarizing your accounts, see your accounts listed in groups by balance sheet category and more. Run a one-time report or schedule reports you wish to see more frequently.



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# Commerce Trust Mobile App

Last Revised: 9/19/2023

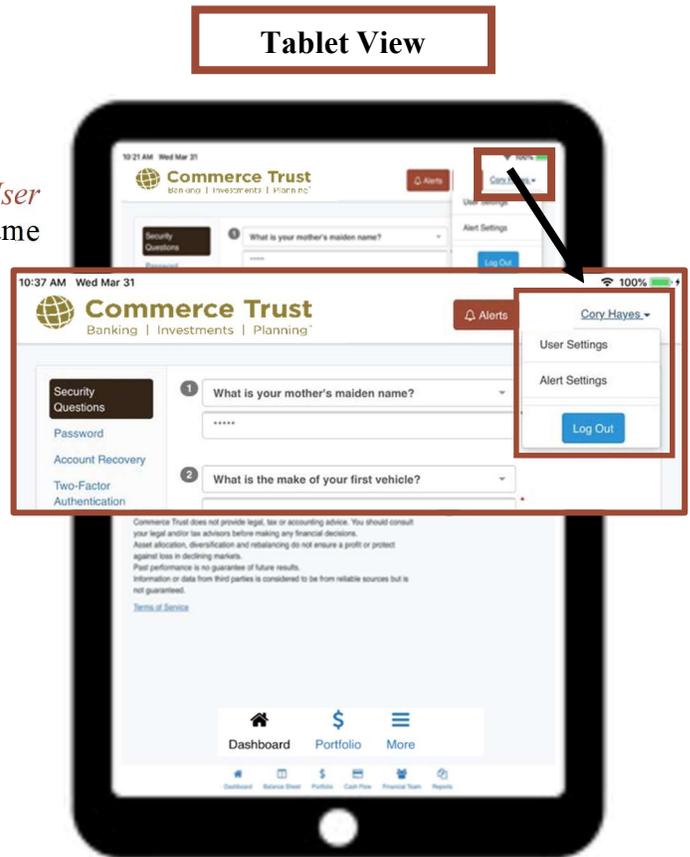
## Tablet View

### User Settings & Alert Settings

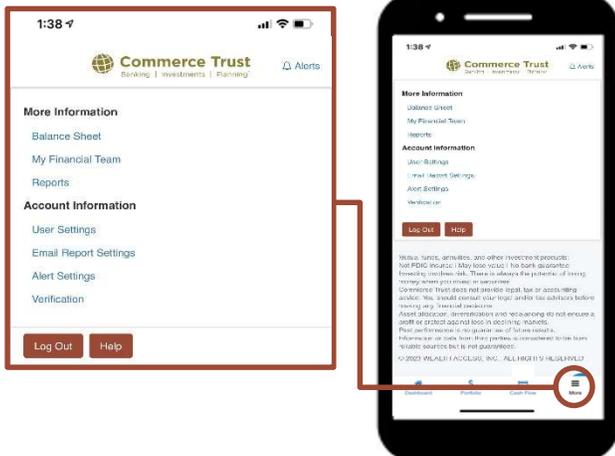
#### IMPORTANT

In the **tablet version** of the app, you'll access the *"User Settings"* and *"Alert Settings"* by tapping on your name link in the upper right corner of the app.

In the **phone version** of the app, you'll access the *"User Settings"* and *"Alert Settings"* by tapping the **"More"** navigation icon button.



## Phone View



### User Settings

Do you need to update your security questions or password? Maybe you need to request a new password? Find these resources in User Settings.

### Account Alerts

Would you like to receive alerts? You can set up alerts for items important to you. When you log in, you'll see those alerts at the top of your dashboard or receive the alert by email. You choose the frequency of the alert. Doing so will keep you informed of certain changes to your overall portfolio, balance updates, transactions, and more.