

# TOTAL WEALTH

Central Trust Company  
*Client Central Dashboard*

## Quick Guide

Revised January, 2020



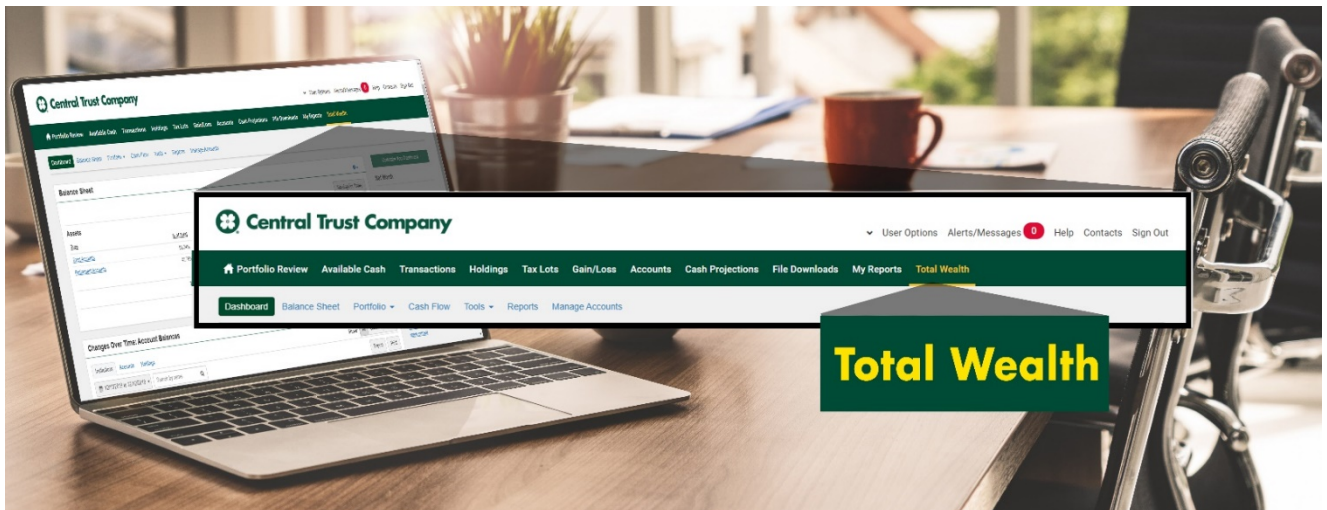
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# Total Wealth Tab

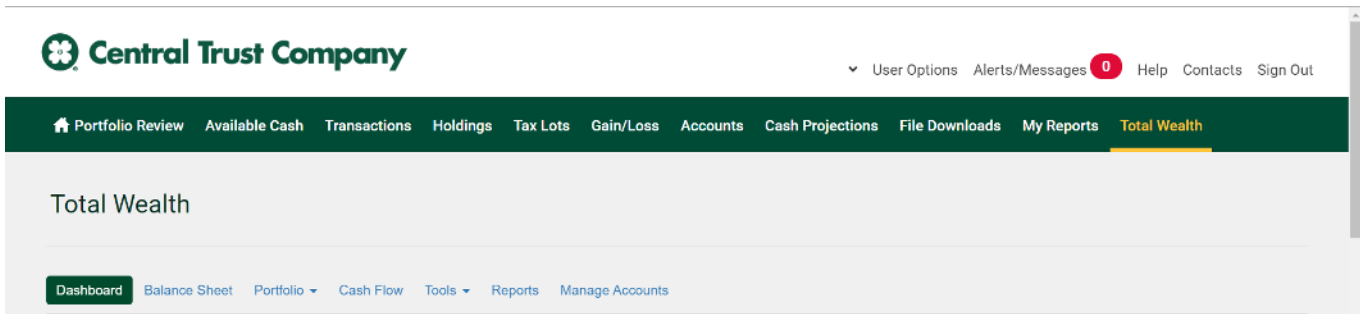
(From the Client Central Home Screen)

By default, when you log in to your Client Central Dashboard, you'll see a new "Total Wealth" tab on the far right. Select this tab to launch Total Wealth.



# Total Wealth Tab

By default, you will be taken to your Total Wealth Dashboard. This is a high level view of your account information including top level navigation:



- Balance Sheet
- Portfolio
- Cash Flow
- Tools
- Reports
- Manage Accounts

# Total Wealth Dashboard

The following page will help you become familiar with your new capabilities in the Total Wealth *Dashboard*.

# Total Wealth Dashboard

The screenshot displays the Central Trust Company Total Wealth Dashboard. The interface includes a top navigation bar with links like Portfolio Review, Available Cash, Transactions, Holdings, Tax Lots, Gain/Loss, Accounts, Cash Projections, File Downloads, My Reports, and Total Wealth. The main content area is divided into several sections: Balance Sheet, Changes Over Time: Account Balances, and Asset Allocation. The Balance Sheet section shows Assets and Liabilities. The Changes Over Time section displays a table of account balances. The Asset Allocation section features a donut chart showing the distribution of assets. Numbered callouts (1-7) point to specific features: 1. Top Level Navigation (top bar), 2. Balance Sheet (Balance Sheet section), 3. Area to Customize your Dashboard (Customize Your Dashboard button), 4. Settings (Gear icon), 5. Select Filters (Select Filters button), 6. View your Account Changes Over Time (Changes Over Time section), and 7. Asset Allocation (Asset Allocation section).

**1. Top Level Navigation**

**2. Balance Sheet**

**3. Area to Customize your Dashboard**

**4. Settings**

**5. Select Filters**

**6. View your Account Changes Over Time**

**7. Asset Allocation**

- 1. Top Level Navigation:** Navigation for your Total Wealth Dashboard.
- 2. Balance Sheet:** Your Central Trust accounts can be viewed here, along with other accounts you can add including credit cards, bank accounts, real estate, mortgage, loans, etc.
- 3. Customize Your Dashboard:** Click on this button and follow the onscreen directions to customize your dashboard.
- 4. Settings:** Click the *Gear* to move a particular section down, up or remove entirely.
- 5. Select Filters:** Click the Select Filters button to customize your Total Wealth Dashboard.
- 6. Account Balances:** View your account balances over time. Use the time period selector to view for a particular time period. You can also sort by particular *Institution, Accounts and Holdings*. You also have the option to *Export via Microsoft Excel, or Print*.
- 7. Asset Allocation:** Get a visual representation of your Asset Allocation. By default, this section will display your assets updated for today, or click the *Viewing For Today* button to set a particular time frame. You can also use the *Export* button to view your Asset Allocation in Microsoft Excel.

# Sessions

**Please Note:** You will notice at the bottom of each window that your Client Central Portal will track each session, as well as give you a time stamp on the bottom right when your session will end. A pop up message will ask you if you wish to stay logged in after 20 minutes. This is an Information Security feature that is common in the industry to safeguard your information.



WL 2019.2.1007.19

©2019

🔒 Last login: Dec 16, 2019 3:22 PM

Good Afternoon, Wealth . Your session will end at 12:51PM

## Session will be closed

There has been no server activity for an extended period of time.

**Your session will time out in 1 minute and 54 seconds.**

Click 'Stay' to continue your session, or click 'Exit' to end it.

If you do not respond within two minutes your session will be terminated and you will lose any unsaved work on the current page.

STAY

EXIT



# Balance Sheet Tab

The next menu selection gives you an overview of your *Balance Sheet*. The following section will help guide you through this page.



# Balance Sheet Tab

The screenshot shows the Central Trust Company Balance Sheet interface. It includes a top navigation bar with links like Portfolio Review, Available Cash, Transactions, Holdings, Tax Lots, Gain/Loss, Accounts, Cash Projections, File Downloads, My Reports, and Total Wealth. Below this is a sub-navigation bar with Dashboard, Balance Sheet (selected), Portfolio, Cash Flow, Tools, Reports, and Manage Accounts. The main content area displays the Balance Sheet with Assets and Liabilities sections. Assets are listed with columns for % of Total and Balance. Liabilities are listed with columns for Total and Balance. A left sidebar contains a Select View section with options for Balances, Chart, and Historical Values, and a Filter Your Portfolio section with a button for Select Filters. Four blue callout boxes with arrows point to specific elements: 1. Assets (points to the Assets section header), 2. Liabilities (points to the Liabilities section header), 3. Select View (points to the Select View section), and 4. Filter (points to the Filter Your Portfolio section).

**Balance Sheet**

Assets: \$9,789,574.59  
Liabilities: \$0.00

Select View:

Balances \$  
Chart  
Historical Values

Filter Your Portfolio:

Everything is shown  
Select Filters

**Assets**

	% of Total	Balance
Ivira		
Trust Accounts	58.28%	\$5,705,335.63
Retirement/Accounts	41.72%	\$4,084,238.96
<b>Total Assets: \$9,789,574.59</b>		

**Liabilities**

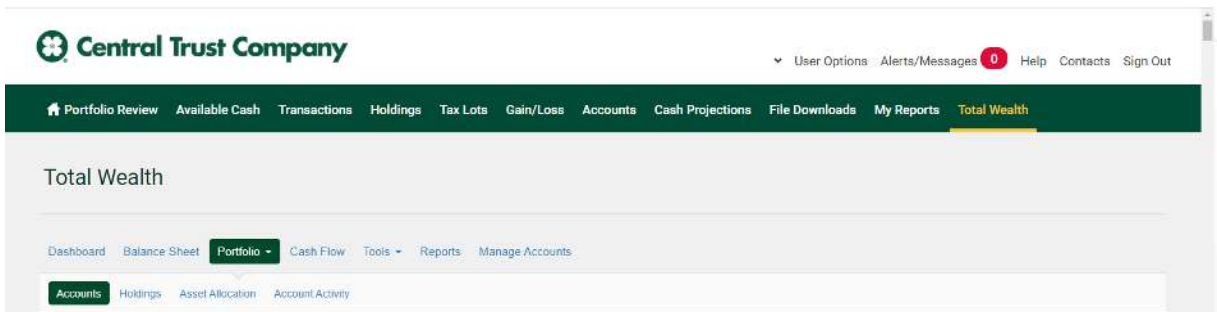
	Total	Balance
Ivira		
No liabilities have been added.		
<b>Total Liabilities: \$0.00</b>		

Net Worth: \$9,789,574.59

1. **Assets:** All assets in your portfolio are shown here, included linked or aggregated accounts.
2. **Liabilities:** Any liabilities that you have added will be shown here.
3. **Select View:** This section allows you to customize your *Assets* and *Liabilities* views. You can view in either Balance View, Charts View (Bar Chart or Pie Chart), and show your historical values over time (1 month up to 3 years), or you can customize the time frame.
4. **Filter:** As with other sections, you can apply custom filters to your dashboard to see everything you have aggregated into Total Wealth, or simply select the accounts you want to view by clicking the *Select Filters* button.

# Portfolio Tab

The next menu selection lets you view your entire portfolio in more detail.



Accounts

Holdings

Asset Allocation

Account Activity

# Portfolio Tab - Accounts

The screenshot shows the Central Trust Company website interface. At the top is the company logo and navigation links: User Options, Alerts/Messages (0), Help, Contacts, and Sign Out. Below this is a dark green navigation bar with links: Portfolio Review, Available Cash, Transactions, Holdings, Tax Lots, Gain/Loss, Accounts, Cash Projections, File Downloads, My Reports, and Total Wealth (highlighted). The main content area is titled 'Total Wealth' and contains a sub-header with links: Sheet, Portfolio (selected), Cash Flow, Tools, Reports, and Manage Accounts. Below this is a search bar and a table of accounts. On the left, there is a 'Select View:' section with options: Balances (selected), Charts, and Historical Values. Below that is a 'Filter Your Portfolio:' section with a 'Select Filters' button. At the bottom left, there is a 'Group By:' section with options: No Grouping (selected), Institution, and Balance Sheet Category. On the right, there is a 'Viewing For Today' section with 'Export' and 'Print' buttons. The table of accounts lists three accounts: John Doe Revocable Living Trust, Jane Doe Revocable Living Trust, and Jane Doe Traditional Ira, with their respective balances and details links. A 'Totals' row at the bottom shows a balance of \$9,893,386.66. Numbered callouts 1 through 6 are overlaid on the image, pointing to specific features: 1. View your Accounts Here (points to the table), 2. Account View (points to the 'Details' link), 3. Export or Print (points to the 'Export' and 'Print' buttons), 4. Select Views (points to the 'Select View:' section), 5. Filter (points to the 'Select Filters' button), and 6. Group By (points to the 'Group By:' section).

Central Trust Company

User Options Alerts/Messages 0 Help Contacts Sign Out

Portfolio Review Available Cash Transactions Holdings Tax Lots Gain/Loss Accounts Cash Projections File Downloads My Reports Total Wealth

Total Wealth

Sheet Portfolio Cash Flow Tools Reports Manage Accounts

Asset Allocation Account Activity

1. View your Accounts Here

2. Account View

3. Export or Print

4. Select Views

5. Filter

6. Group By

Name	Balance	Account Type	Last Updated	Details
John Doe Revocable Living Trust at Central Trust	\$4,881,275.46	Trust Accounts	Today	Details
Jane Doe Revocable Living Trust at Central Trust	\$4,086,388.41	Retirement Accounts / Traditional IRA	Today	Details
Jane Doe Traditional Ira at Central Trust	\$835,724.79	Trust Accounts	Today	Details
<b>Totals:</b>	<b>\$9,893,386.66</b>			

Select View: Balances Charts Historical Values

Filter Your Portfolio: Everything is shown Select Filters

Group By: Add No Grouping Institution Balance Sheet Category

Viewing For Today Export Print

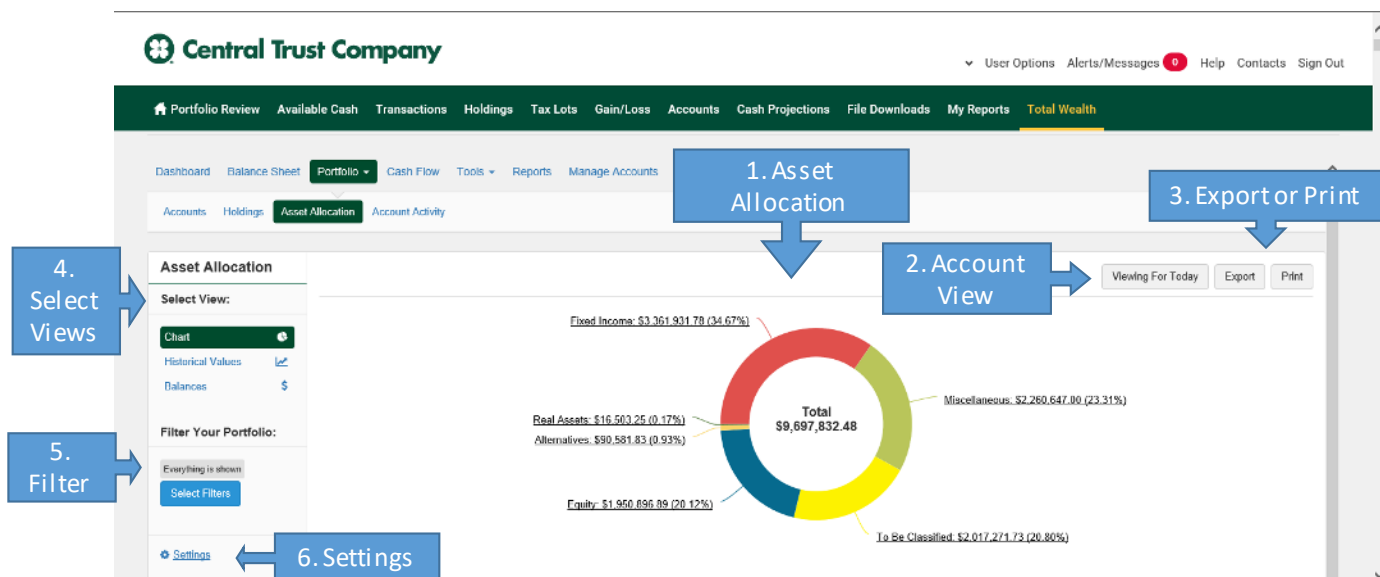
1. **Accounts:** All accounts in your portfolio are shown here, included linked or aggregated accounts.
2. **Account View:** You can view your accounts.
3. **Export or Print:** You can *Export* this view as a Microsoft Excel file, or *Print*.
4. **Select Views:** This section allows you to customize your *Account* views. You can view in either Balance View, Charts View (Bar Chart or Pie Chart), and show your historical values over time (1 month up to 3 years), or you can customize the time frame.
5. **Filter:** As with other sections, you can apply custom filters to your dashboard to see everything you have aggregated into Total Wealth, or simply select the accounts you want to view by clicking the *Select Filters* button.
6. **Grouping:** Group your accounts by category. You can create your own grouping, or use a grouping already available. By default, the grouping is set to "No Grouping."

# Portfolio Tab - Holdings

The screenshot shows the Central Trust Company website's Portfolio Holdings page. The page has a dark green header with the company logo and navigation links. Below the header is a light green navigation bar with tabs for Portfolio Review, Available Cash, Transactions, Holdings, Tax Lots, Gain/Loss, Accounts, Cash Projections, File Downloads, My Reports, and Total Wealth. The Holdings tab is selected. On the left, there's a sidebar with options for Select Views (Balances, Historical Values), Filter Your Portfolio (Everything is shown, Select Filters), and Group By (No Grouping, Asset Allocation, Account, Security). The main area displays a table of holdings with columns for Name, Cost Basis, Last Updated, and Details. Callouts are placed over the interface: 1. Holdings (points to the main table), 2. Account View (points to the 'Viewing For Today' dropdown), 3. Export or Print (points to the 'Export' and 'Print' buttons), 4. Select Views (points to the 'Balances' and 'Historical Values' options), 5. Filter (points to the 'Select Filters' button), and 6. Grouping (points to the 'No Grouping' option in the 'Group By' section).

1. **Holdings:** All *Holdings* in your portfolio are shown here.
2. **Account View:** You can view your accounts to date, or select a time period.
3. **Export or Print:** You can *Export* this view as a Microsoft Excel file, or *Print*.
4. **Select Views:** This section allows you to customize your *Account View*. You can view in either Balance View, or Historical Values.
5. **Filter:** As with other sections, you can apply custom filters to your dashboard to see everything, or simply select the accounts you want to view by clicking the *Select Filters* button.
6. **Grouping:** Group your Holdings by category: Asset Allocation, Account, Security. By default, the grouping is set to "No Grouping."

# Portfolio Tab – Asset Allocation



1. **Asset Allocation:** Your total Asset Allocation is shown here. By default you will see your *Asset Allocation* in Pie Chart form, but can choose *Select View* on the left navigation to see historical values or balances.
2. **Account View:** You can view your accounts to date, or select a time period.
3. **Export or Print:** You can *Export* this view as a Microsoft Excel file, or *Print*.
4. **Select Views:** This section allows you to customize your *Account View*. You can view in either Balance View, Charts View (Bar Chart or Pie Chart), and show your historical values over time (1 month up to 3 years), or you can customize the time frame.
5. **Filter:** As with other sections, you can apply custom filters to your dashboard to see everything, or simply select the accounts you want to view by clicking the *Select Filters* button.
6. **Settings:** Decide what to include in your asset allocation. You can also force the value of a holding to be positive or negative.

# Portfolio Tab – Account Activity



[User Options](#)
[Alerts/Messages 0](#)
[Help](#)
[Contacts](#)
[Sign Out](#)

[Portfolio Review](#)
[Available Cash](#)
[Transactions](#)
[Holdings](#)
[Tax Lots](#)
[Gain/Loss](#)
[Accounts](#)
[Cash Projections](#)
[File Downloads](#)
[My Reports](#)
[Total Wealth](#)

[Dashboard](#)
[Balance Sheet](#)
[Portfolio](#)
[Cash Flow](#)
[Tools](#)
[Reports](#)
[Manage Accounts](#)

[Accounts](#)
[Holdings](#)
[Assets](#)

6. Date Range

1. Account Activity

2. Export or Print

3. Select Views

4. Filter

5. Details

## Account Activity

Select View:

Transactions

Charts

Filter Your Portfolio:

Everything is shown

Select Filters

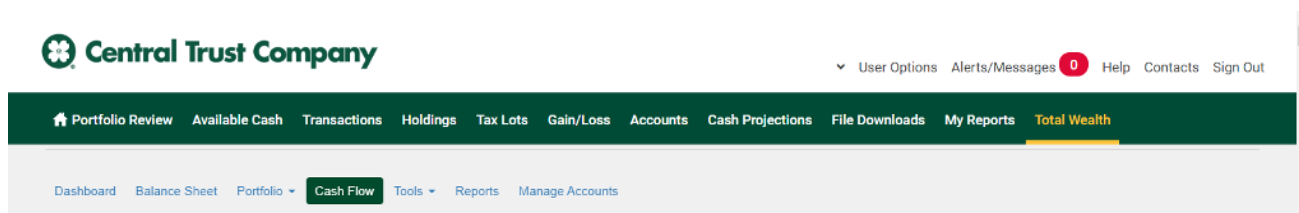
Account	Type	Amount	Date	
Jane Doe Revocable Living Trust at Central Trust	Tax Lot Adjust TAX LOT ADJUSTMENT FDIC INSURED MONEY MARKET PROGRAM -----OLD----- -----NEW SHARES 41 492.23 UNITS 47 928.6 UNITS TAX DATE 12/15/2019 12/05/2019 12/11/2019 FED COST 41 492.23 47 928.69 SITE COST 41 492.23 47 928.60 REG 200 200	\$0.00	12/15/2019	Details
Jane Doe Revocable Living Trust at Central Trust	Tax Lot Adjust TAX LOT ADJUSTMENT FDIC INSURED MONEY MARKET PROGRAM -----OLD----- -----NEW SHARES 6 436.37 UNITS 47 928.6 UNITS TAX DATE 12/11/2019 12/05/2019 12/11/2019 FED COST 6 436.37 47 928.69 SITE COST 6 436.37 47 928.60 REG 200 200	\$0.00	12/15/2019	Details
Jane Doe Revocable Living Trust at Central Trust	Tax Lot Adjust TAX LOT ADJUSTMENT FDIC INSURED MONEY MARKET PROGRAM -----OLD----- -----NEW SHARES 41 492.23 UNITS 47 928.6 UNITS TAX DATE 12/15/2019 12/05/2019 12/11/2019 FED COST 41 492.23 47 928.69 SITE COST 41 492.23 47 928.60 REG 200 200	\$0.00	12/15/2019	Details
Jane Doe Revocable Living Trust at Central Trust	Tax Lot Adjust TAX LOT ADJUSTMENT FDIC INSURED MONEY MARKET PROGRAM -----OLD----- -----NEW SHARES 6 436.37 UNITS 47 928.6 UNITS TAX DATE 12/11/2019 12/05/2019 12/11/2019 FED COST 6 436.37 47 928.69 SITE COST 6 436.37 47 928.60 REG 200 200	\$0.00	12/15/2019	Details

- Account Activity:** The details of your portfolio transactions are shown here.
- Export or Print:** You can *Export* this view as a Microsoft Excel file, or *Print*.
- Select Views:** This section allows you to customize your View. By default, you will see your *Transactions* listed, or you can switch to *Chart View*.
- Filter:** As with other sections, you can apply custom filters to your dashboard to see everything, or simply select the accounts you want to view by clicking the *Select Filters* button.
- Details:** To view each *Transaction* in more detail, select the *Details* button next to the *Transaction*.
- Date Range:** The date range can be manually changed to show the last month, the last three months, this year, last year, or a custom date range.



# Cash Flow Tab

This section allows you to view your overall Cash Flow with your bank accounts and credit cards. You can see how your income and spending fluctuates month to month and better understand your spending habits.



# Cash Flow Tab

The screenshot shows the Central Trust Company website interface. At the top is the company logo and navigation links: User Options, Alerts/Messages (0), Help, Contacts, and Sign Out. Below this is a dark green navigation bar with links: Portfolio Review, Available Cash, Transactions, Holdings, Tax Lots, Gain/Loss, Accounts, Cash Projections, File Downloads, My Reports, and Total Wealth. The main content area has a sub-navigation bar with Dashboard, Balance Sheet, and Reports. The 'Cash Flow' section is highlighted. On the left, there's a 'Select View:' dropdown menu with options: Overview (selected), Transactions, Charts, and Historical Values. Below this is a 'Filter Cash Flow:' section with a 'Select Filters' button. At the top of the main content area, there's a 'Date Range' dropdown menu showing '12/1/2019 to 12/20/2019'. To the right of the date range is a 'Print' button. The main content area itself has a heading 'Start Understanding your Cash Flow Today' and a sub-heading 'We can help you' with three bullet points: 'See how your income and spending fluctuates month to month.', 'Better understand your spending habits.', and 'Track how your Cash Flow changes over time.'

3. Select Views

4. Filter

6. Date Range

1. Cash Flow

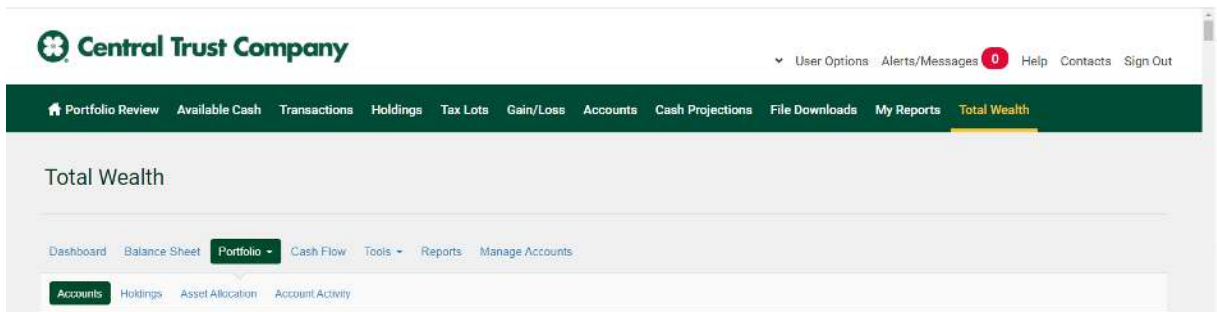
2. Print

1. **Cash Flow:** Once you aggregate your bank and credit card accounts, this activity will show up here. You can also select the time period you would like to view.
2. **Print:** You can use this button to print out and view your *Cash Flow*.
3. **Select Views:** This section allows you to customize your View. By default, you will see an *Overview* of your accounts. You can also select to view your *Transactions* by time period, or switch to view by *Chart* or *Historical Values*.
4. **Filter:** As with other sections, you can apply custom filters to your dashboard to see everything, or simply select the accounts you want to view by clicking the *Select Filters* button.
5. **Date Range:** The date range can be manually changed to show the last month, the last three months, this year, last year, or a custom date range.



# Tools Tab

The next menu selection lets you view your entire portfolio in more detail.



Document Vault  
My Financial Team

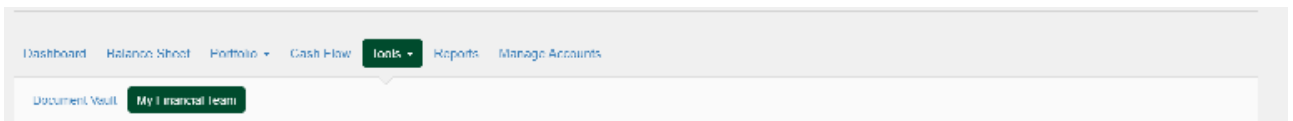
# Tools Tab – Document Vault

The screenshot shows the Central Trust Company website's Document Vault interface. At the top, the company logo and navigation menu are visible. The 'Tools' tab is selected, leading to the 'Document Vault' section. The interface includes a file upload area, a list of uploaded files, and search/bulk action options. Five blue callout boxes with arrows point to specific features: 1. Upload Files (points to the upload area), 2. Completed Uploaded Files (points to the list of uploaded files), 3. Search, Bulk Actions, Add Folders (points to the search bar and bulk action buttons), 4. Uploaded Files (points to the first file in the list), and 5. Actions (points to the 'Actions' dropdown menu for a file).

1. **Upload Files:** To upload your documents to the *Document Vault*, you can drag them from your computer to this area, or click “*Select File*” to add them.
2. **Completed Uploaded Files:** Once you upload your files, they will show here.
3. **Search, Bulk Actions, Add Folders:** Search for a specific file, choose to edit, move or delete multiple files at once, or create a folder to organize your files.
4. **Uploaded Files:** Your *Uploaded Files* will appear here.
5. **Actions:** For each *Document*, you can *Edit, Move or Delete* your file.

# My Financial Team Tab

This area will allow you to collaborate with your Central Trust Company Advisor. You control the documents and access you share in this area. Your Advisor will not have any access to your information unless it is granted by you.



# My Financial Team Tab

The screenshot shows the 'My Financial Team' tab in the Central Trust Company portal. The interface includes a top navigation bar with links like 'Portfolio Review', 'Available Cash', 'Transactions', 'Holdings', 'Tax Lots', 'Gain/Loss', 'Accounts', 'Cash Projections', 'File Downloads', 'My Reports', and 'Total Wealth'. Below this is a sub-navigation bar with 'Dashboard', 'Balance Sheet', 'Portfolio', 'Cash Flow', 'Tools', 'Reports', and 'Manage Accounts'. The main content area is titled 'Document Vault' and 'My Financial Team'. A blue box labeled '1. CTC Office' points to the 'Central Trust Company - Springfield Office' entry. A blue box labeled '2. Add New Team Member' points to the 'Add New Team Member' button. A blue box labeled '3. Permissions' points to the 'Permissions' tab in the team member's profile. The profile shows contact information and firm information for the Springfield Office.

**1. CTC Office**

**2. Add New Team Member**

**3. Permissions**

**Central Trust Company - Springfield Office**

Click the Contacts button at the top of the page to see contact information for your specific team.

customer.service@centraltrust.net (417) 863-3836

☒ Allow to mimic you and act like they are logged in as you.  
They can help with setup and can help them see what you are seeing. They won't be able to change any permissions or security settings.

Information Account Permissions Document Permissions

**Contact Information**

Work Phone: (417) 863-3836  
Mobile Phone:  
Email: customer.service@centraltrust.net

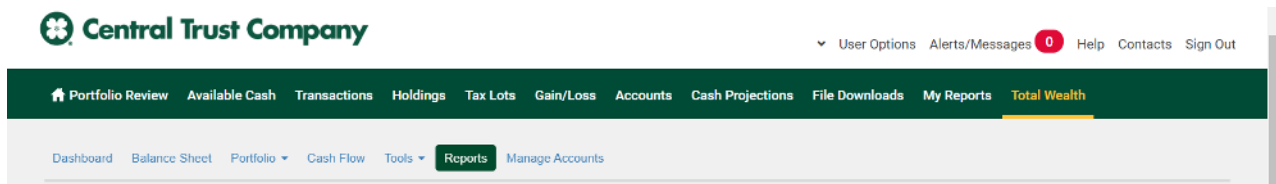
**Firm Information**

Address: 3333 E. National, Third Floor  
Springfield, MO 65807  
Website: <https://centraltrust.net/locations/springfield-office/>

1. **CTC Office:** Your Central Trust Company office will be listed here to contact directly.
2. **Add New Team Member:** You can add additional Central Trust Company Advisors here.
3. **Permissions:** Here is where you can add permissions to your account and documents. You have control over what your Central Trust Company Advisor can view.

# Reports Tab

This area will allows you to generate different types of reports from Total Wealth.



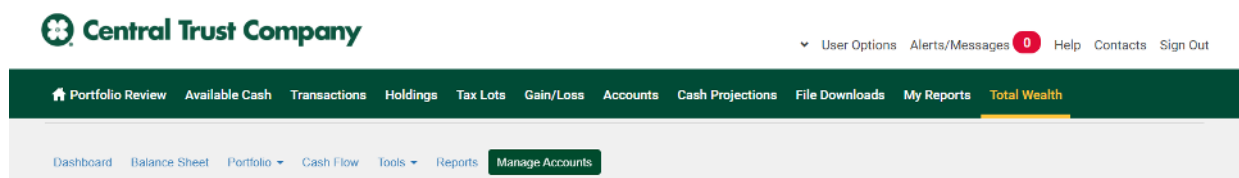
# Reports Tab

The screenshot shows the Central Trust Company website's Reports Tab. The top navigation bar includes links for Portfolio Review, Available Cash, Transactions, Holdings, Tax Lots, Gain/Loss, Accounts, Cash Projections, File Downloads, My Reports, and Total Wealth. Below this, a sub-navigation bar highlights the Reports tab. The main content area is titled 'Reports' and features a 'Create New Report' button, a search bar, a 'Sort' dropdown, and a list of default reports: Account Summary, Balance Sheet Summary, Personal Financial Statement, and Portfolio Diversification Report. Each report has a 'Run' link. On the right, there is a 'Schedule Reports' link. Four blue callout boxes with arrows point to these key features: 1. Create New Report, 2. Default Reports, 3. Sort, and 4. Schedule Reports.

1. **Create New Report:** This section comes with a set of default reports. Or you can customize reports.
2. **Default Reports:** Your Default Reports will appear here. Click on a *Report* to see a summary to the right, or click Run to run a particular report.
3. **Sort:** Sort the order of your reports and how they appear.
4. **Schedule Reports:** Here is where you can *Schedule* your reports to run automatically.

# Manage Accounts Tab

This area is where you can add outside accounts to your Total Wealth Account. Link your credit cards, bank accounts, real estate, mortgage, loans, and more. This allows you to see your complete financial picture. Total Wealth makes it easy to aggregate your accounts with a simple to use interface.



# Manage Accounts Tab

The screenshot shows the Central Trust Company website's 'Manage Accounts' tab. The interface includes a top navigation bar with links like 'Portfolio Review', 'Available Cash', 'Transactions', 'Holdings', 'Tax Lots', 'Gain/Loss', 'Accounts', 'Cash Projections', 'File Downloads', 'My Reports', and 'Total Wealth'. Below this is a sub-navigation bar with 'Dashboard', 'Balance Sheet', 'Portfolio', 'Cash Flow', 'Tools', 'Reports', and 'Manage Accounts'. The 'Manage Accounts' section has a search bar, a list of 'Connected Accounts' (showing 'Central Trust (3)' with a balance of '\$9,792,705.95'), and a 'Sort' dropdown. Three blue callout boxes with arrows point to: 1. 'Add Accounts' button, 2. 'Connected Accounts' list, and 3. 'Sort' dropdown. To the right, there is a section for 'Add New Accounts' with a list of categories: Banking and Investment Accounts, Real Estate, Vehicles, and Personal Property.

1. **Add Accounts:** Click the *Add Accounts* button to open an interface that will walk you through adding your accounts. You simply type in the name of the institution and Total Wealth will see if they are already in the system. If not, you can manually add an institution.
2. **Connected Accounts:** Your *Connected Accounts* will appear here. Click on an *Account* to see a summary to the right.
3. **Sort:** Sort the order of your accounts and how they appear.

Add Accounts

Link your accounts that are accessible online

Search by name of institution or the URL that you use to log in with

Example Searches: Fidelity or www.vanguard.com

Don't have the ability to log in and access your accounts?

Manually Enter Accounts

Use this for things like vehicles or real estate that are not tracked online. Also use this when you are unable to find the website you use to log in or your bank doesn't offer service online.

Cancel



# Technical Support

If technical support is needed, we encourage Total Wealth users to first, contact their Relationship Manager for assistance, primarily with navigation or using features of Total Wealth.

If assistance is needed to add outside accounts or combat site malfunctions, these requests will be handled by the Total Wealth support team. This is done by selecting “Help” within the site, and choosing “Contact Support”.

The screenshot displays the Central Trust Company Total Wealth interface. At the top, the Central Trust Company logo is on the left, and user options (User Options, Alerts/Messages, Help, Contacts, Sign Out) are on the right. The main navigation bar includes Portfolio Review, Available Cash, Transactions, Holdings, Tax Lots, Gain/Loss, Accounts, Cash Projections, File Downloads, My Reports, and Total Wealth (highlighted). Below this, the 'Total Wealth' section is shown, with sub-tabs for Dashboard, Balance Sheet, Portfolio, Cash Flow, Tools, Reports, and Manage Accounts (selected). The 'Manage Accounts' section features a search bar, a table of connected accounts, and a summary of assets and liabilities. A blue arrow points from the 'Help' link in the top right to a 'Help' dropdown menu. This menu is open, showing 'Contact Support' and 'Verification PIN'. A blue box with the text 'Select Contact Support' and an arrow points to the 'Contact Support' option.

Central Trust Company

User Options Alerts/Messages 0 Help Contacts Sign Out

Portfolio Review Available Cash Transactions Holdings Tax Lots Gain/Loss Accounts Cash Projections File Downloads My Reports Total Wealth

Total Wealth

Dashboard Balance Sheet Portfolio Cash Flow Tools Reports Manage Accounts

Help Link

Manage Accounts

Add Accounts More Options

Start typing to search. Q

Sort

Click on any institution on the left to see the accounts under it

Or Add New Accounts

Entering all your assets and liabilities helps you see your complete financial picture.

This can include:

- Banking and Investment Accounts
- Real Estate
- Vehicles
- Personal Property

Connected Accounts

Central Trust (3)	\$9,786,116.40
-------------------	----------------

Assets: \$9,786,116.40  
Liabilities: \$0.00  
Total: \$9,786,116.40

Help

Help

Contact Support

Verification PIN

Select Contact Support