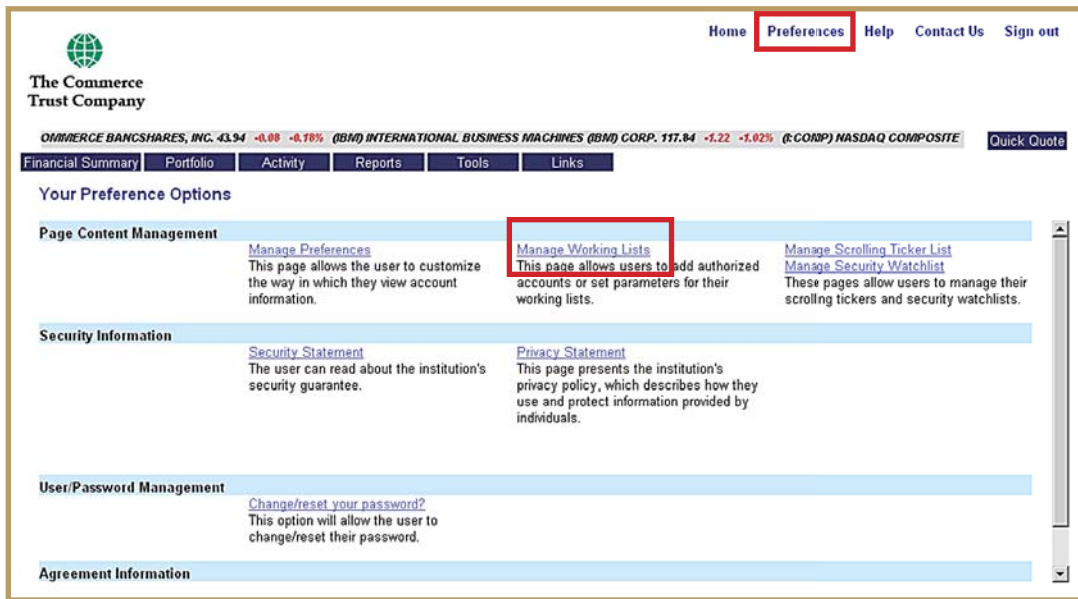




Modifying an Account Working List

To create an account working list, go to Preferences and select "Manage Working Lists."



Select the Working List that you would like to modify from the Account Lists Drop-down and Select "Go."





Highlight an account and use the Add or Remove buttons to modify your Current Account List. You may also type in your account number in the Start Authorized Accounts at: and select Go to scroll the list of Authorized Accounts directly to that account number. Please note there is a maximum of 50 accounts per Working List.

The Commerce Trust Company

Account Lists: TEST Display Lists By: Account Number Firs

Start Authorized Accts at: Go

DNAL BUSINESS MACHINES (BIM) CORP. 115.09 -1.82 -1.56% (I:COMP) NASDAQ COMPOSITE 2,306.29 -18.07 -0.78% (NYA) NYSE COMPOSITE INDEX 8,905.65

Financial Summary Portfolio Activity Reports Tools Links

Account Working List Return

To create an Account List, select 'New Working List' from the Account Lists drop down.

- To add all accounts to a list, select the All Accounts radio button, then Add, and select Save.
- To create or modify a list with select accounts, choose the Selected Accounts radio button, then click on the account(s) desired in the Authorized Account List, click Add and select Save.
- Reset can be used to start over.

To remove an account, select the account(s), click Remove and select Save.

An asterisk (*) next to an account indicates that the account was opened within the last 60 days.

50 Accounts

All Accounts Selected Accounts

Reset Save Save As Delete List

Authorized Account List Sorted By Account Number

11-1111-11-1 SUE SAMPLE ESTATE
11-1111-11-2 SAM SAMPLE ESTATE
11-1111-11-3 SUE SAMPLE CUSTODY
11-1111-11-4 SAM SAMPLE CUSTODY
11-1111-11-5 SUE SAMPLE IRR
11-1111-11-6 SAM SAMPLE IRR
11-1111-11-7 SUE SAMPLE REV
11-1111-11-8 SAM SAMPLE REV
11-1111-11-9 SUE SAMPLE FBO SAM

Next>

Current Account List TEST

11-1111-12-1 SAMPLE FAMILY CRUT
11-1111-12-2 SUE SAMPLE AGY

Add Remove

Once your Current Account List has been updated, select Save.

The Commerce Trust Company

Account Lists: TEST Display Lists By: Account Number Firs

Start Authorized Accts at: Go

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Financial Summary Portfolio Activity Reports Tools Links

Account Working List Return

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- To create or modify a list with select accounts, choose the Selected Accounts radio button, then click on the account(s) desired in the Authorized Account List, click Add and select Save.
- Reset can be used to start over.

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Authorized Account List Sorted By Account Number

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11-1111-11-6 SAM SAMPLE IRR
11-1111-11-7 SUE SAMPLE REV
11-1111-11-8 SAM SAMPLE REV
11-1111-11-9 SUE SAMPLE FBO SAM

Next>

Current Account List TEST

11-1111-12-1 SAMPLE FAMILY CRUT
11-1111-12-2 SUE SAMPLE AGY

Add Remove



A confirmation message will appear telling you that your working list was successfully saved. Select Return to go back to the Main Menu page.

The screenshot shows the website interface for The Commerce Trust Company. At the top, there are navigation links: Home, Preferences, Help, Contact Us, and Sign out. Below this, there are dropdown menus for 'Account Lists' (set to 'TEST') and 'Display Lists By' (set to 'Account Number Firs'). A 'Start Authorized Accts at:' field with a 'Go' button is also present. A market data ticker is visible, showing various indices and their performance. A navigation bar includes links for Financial Summary, Portfolio, Activity, Reports, Tools, and Links. A red-bordered box highlights a confirmation message: 'Your Working List has been saved successfully' with a 'Return' button. Below the message, there are instructions for creating and managing an Account Working List, and a section for '50 Accounts' with radio buttons for 'All Accounts' and 'Selected Accounts'. At the bottom of this section are buttons for 'Reset', 'Save', 'Save As', and 'Delete List'.