CAMBRIDGE

CIRStatements Investor Guide

TABLE OF CONTENTS

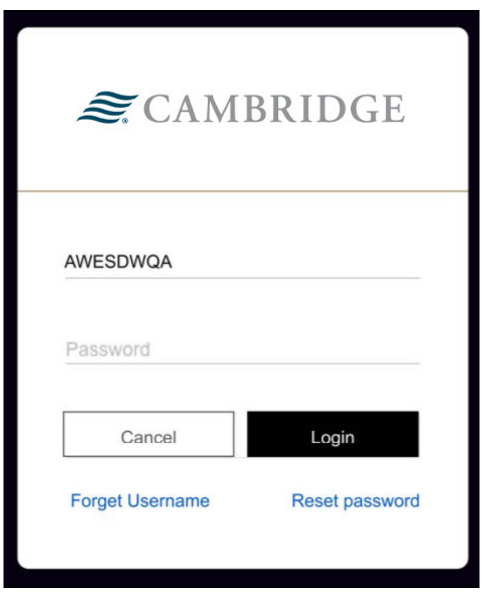
How to Log In

Our current login process is migrating to Microsoft Azure, a platform that requires two-step, also known as two-factor, verification. This standardized login process uses your email address as a unified login ID, fortifies your data integrity, and enhances your user experience across all our applications and the Wove platform.

Once you create a user profile and provide login credentials, all subsequent logins will use the two-step process across applications and firms. This guide will help you establish the user profile and credentials for the unified login process.

Step 1: When you open the application, you will see the following screen. Enter your old login ID.

Step 2: Enter your password and click **Login**.



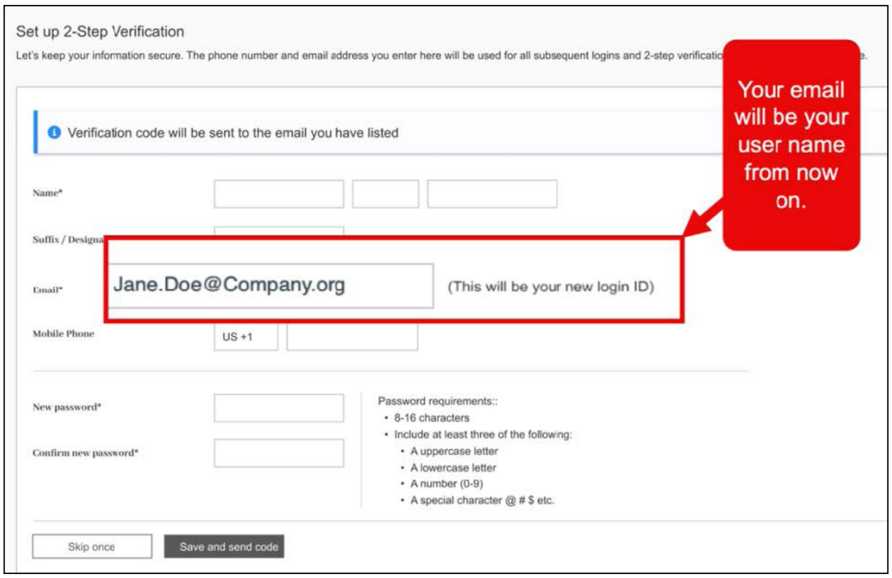
NOTE: If you cannot remember your login ID, just enter what you think it might be, and the system will direct you to the screen in Step 2, where you can click **Forgot Username**. If you cannot remember your password, click **Reset Password**.

Each hyperlink will bring you to the appropriate screen, where you can fill out the necessary information and then click **Send Me Username** or **Reset Password**, depending on your need. Upon completion, you will be redirected to the log-in page shown in Step 1.

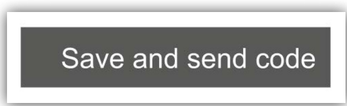
Step 3: Once you have logged in, the system will redirect you to a screen to set up your new username and password. **Your email will be your new username**.

Choose a password of 8-16 characters. Make sure that it includes at least three of the following:

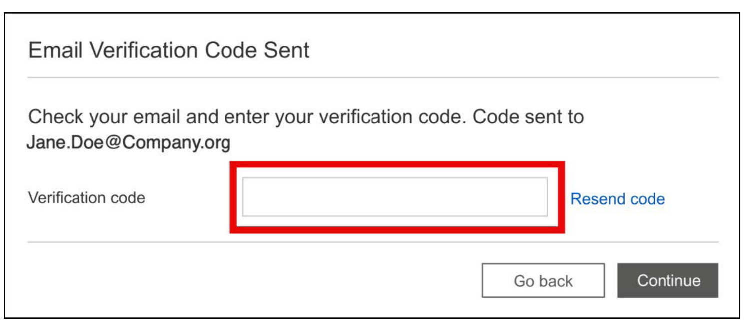
- Uppercase letter
- Lowercase letter
- Number (0 -9)
- Special character, such as @, #, $, etc.



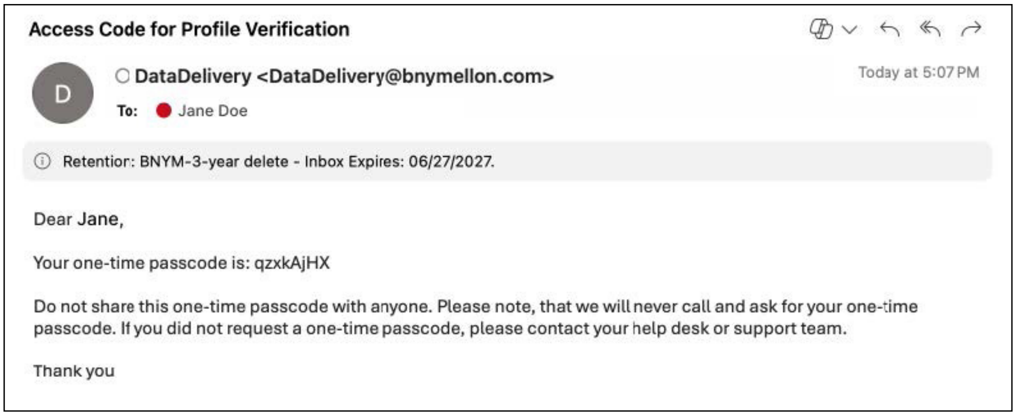
Step 4: Click **Save and send code** at the bottom left of the page.



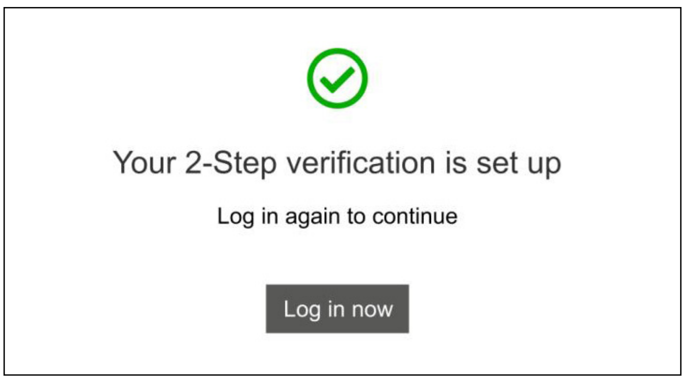
Step 5: The system will notify you that a verification email has been sent to the email account you listed in the previous page.



Step 6: Check your email for a one-time passcode. Then enter the code in the box outlined in red in the figure above. Click **Continue**.



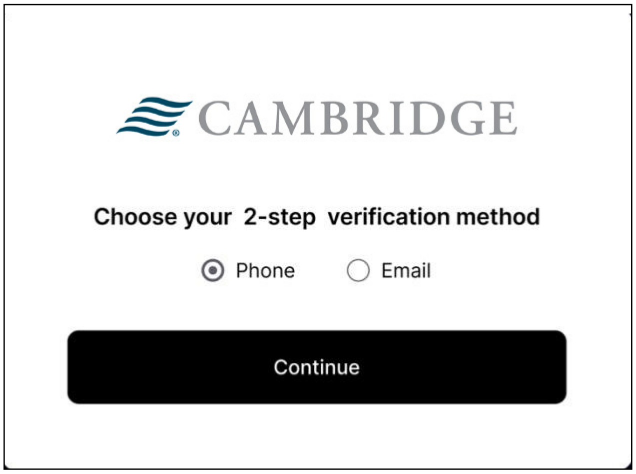
Step 7: A screen noting that your two-step verification has been set up will prompt you to log in again. Click **Log in now**.



Step 8: Enter your password and your login ID, which is your email, and then click **Log in**.

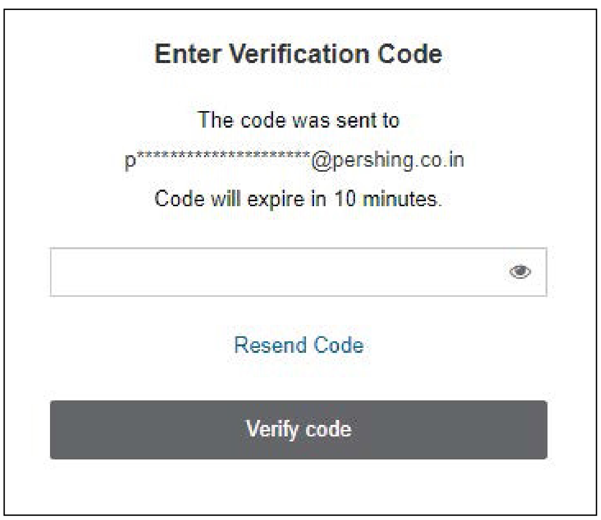
NOTE: Should there be an error, the system will show a message asking you to try setting up two-step verification again. Just click **Try again**, and you will be redirected to the login page, where you can begin setting up your two-set authentication.

Step 9: The system will ask whether to send the verification code to your email or via a text. Choose an option and then click **Continue**.



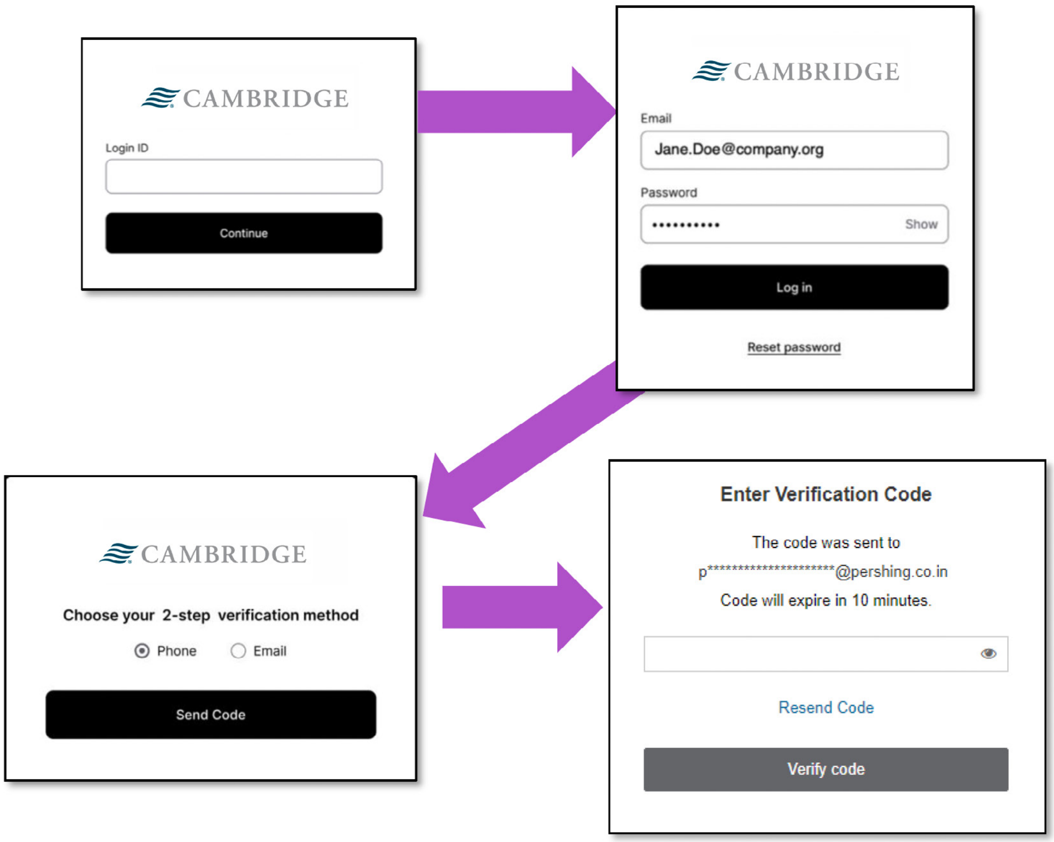
Step 10: Check your email or text messages for the verification code.

Step 11: Enter the verification code in the spaces provided and click **Verify Code**. If you cannot find the code, click **Resend code** and retry.



Step 12: You will land on your home page from which you can navigate through the Wove Reporting application.

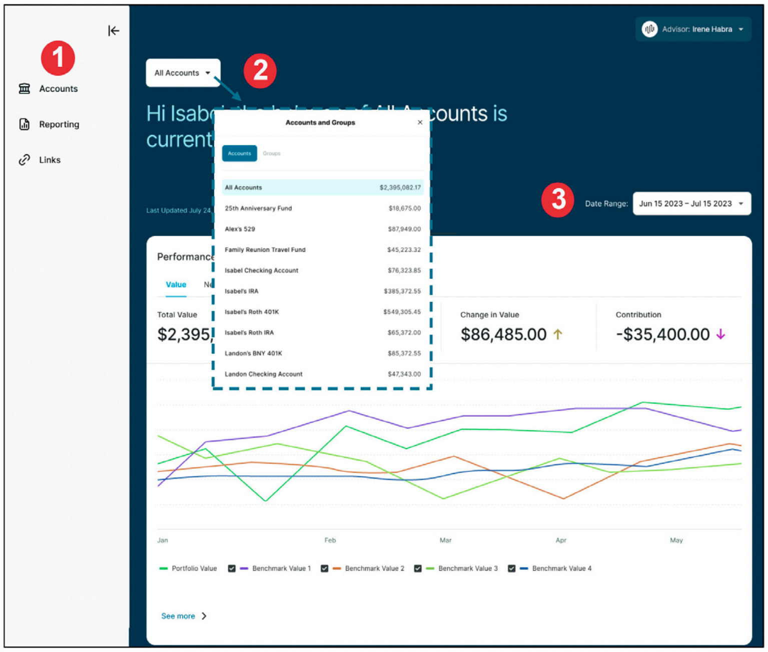
NOTE: After you have set up multi-factor authentication, each time you open the application, the following flow will be how you log in.



CIRStatements Landing Page

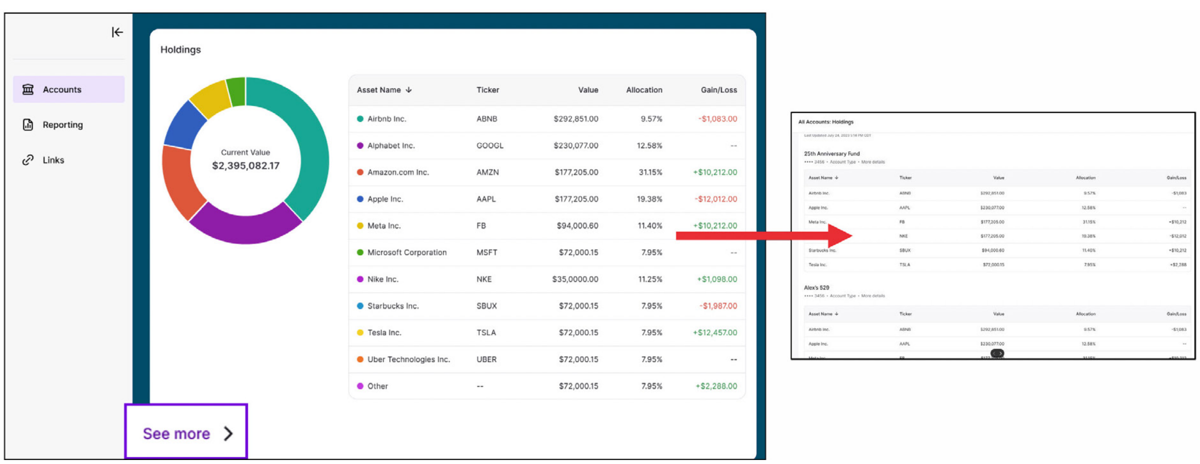
After logging in, you will land on the Accounts landing page where you will see:

1. A side navigation menu for **Accounts**, **Reporting**, and **Links**
2. A dropdown menu that displays each of your **Accounts** and **Groups** (formerly known as Portfolios)
3. The option to select a **Date Range** to view account data



After clicking **Accounts** from the navigation menu, you can scroll down to see an overview of **Holdings**, **Asset Allocation**, and **Activity**. Drill down and view more data on the Holdings and Activity by clicking **See more** in the bottom left corner of each section.

NOTE: You can do this for each individual account.



How to View Individual Accounts

Step 1: From the landing page, scroll down in your dashboard to view individual accounts.

Step 2: Click on an account to open a dashboard page for that individual account.

NOTE: This screen will look like your overall accounts page. You can tell at the top of the page if you are viewing one individual account or your whole portfolio.

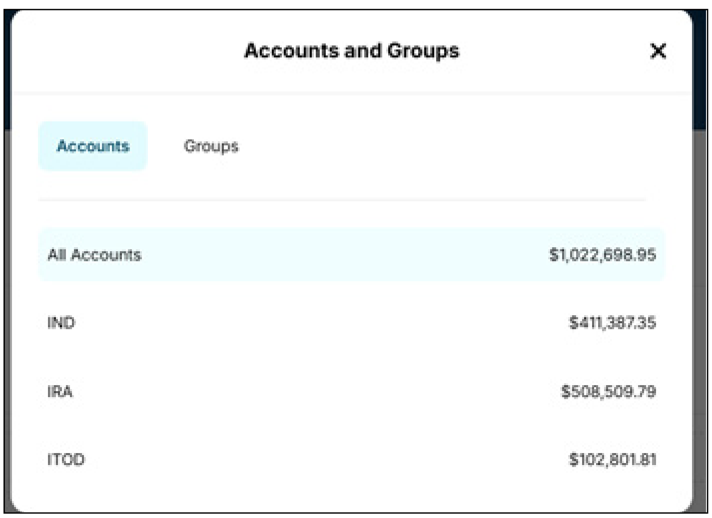
In addition to scrolling through your dashboard, you can click the Accounts drop down at the top of the page, from here you can click on individual accounts and the system will take you to the dashboard page for that account.

How to View Groups (formerly known as Portfolios)

Step 1: If you have accounts grouped together, you can view those groups by clicking on the **Accounts** drop down at the top of the page.

Step 2: A window will open where you can click on **Groups**.

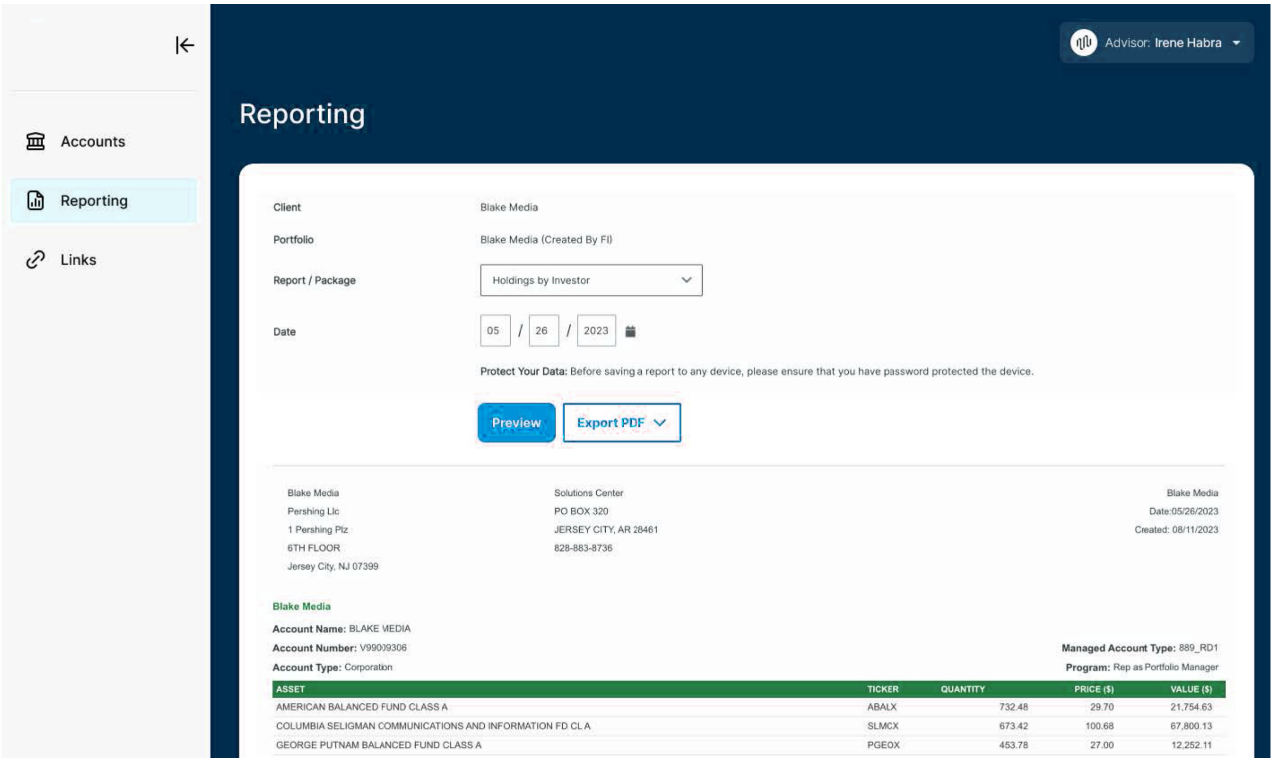
Step 3: Click on a group to access its specific dashboard.



How to View and Run Reports

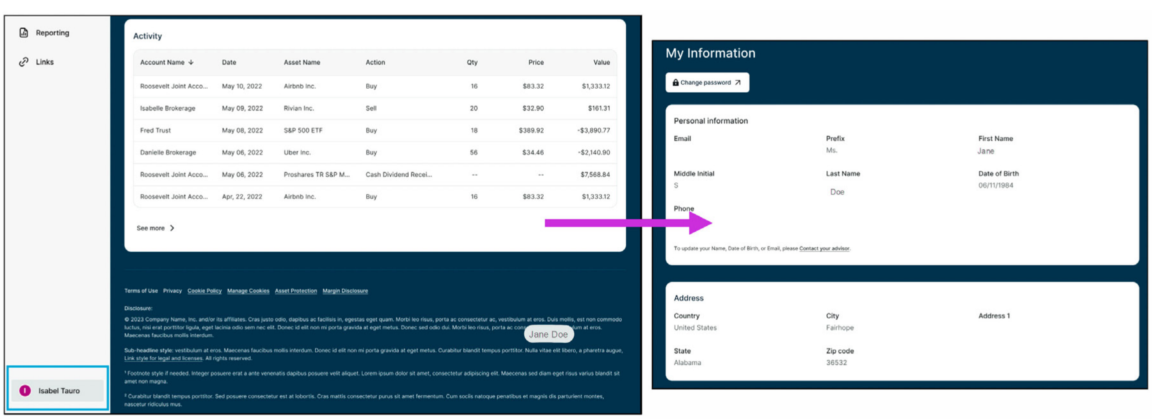
To view and run reports click **Reporting** from the navigation menu.

NOTE: This will open a familiar reporting screen. The functionality remains unchanged, and you will retain access to all the reports you previously had access to.



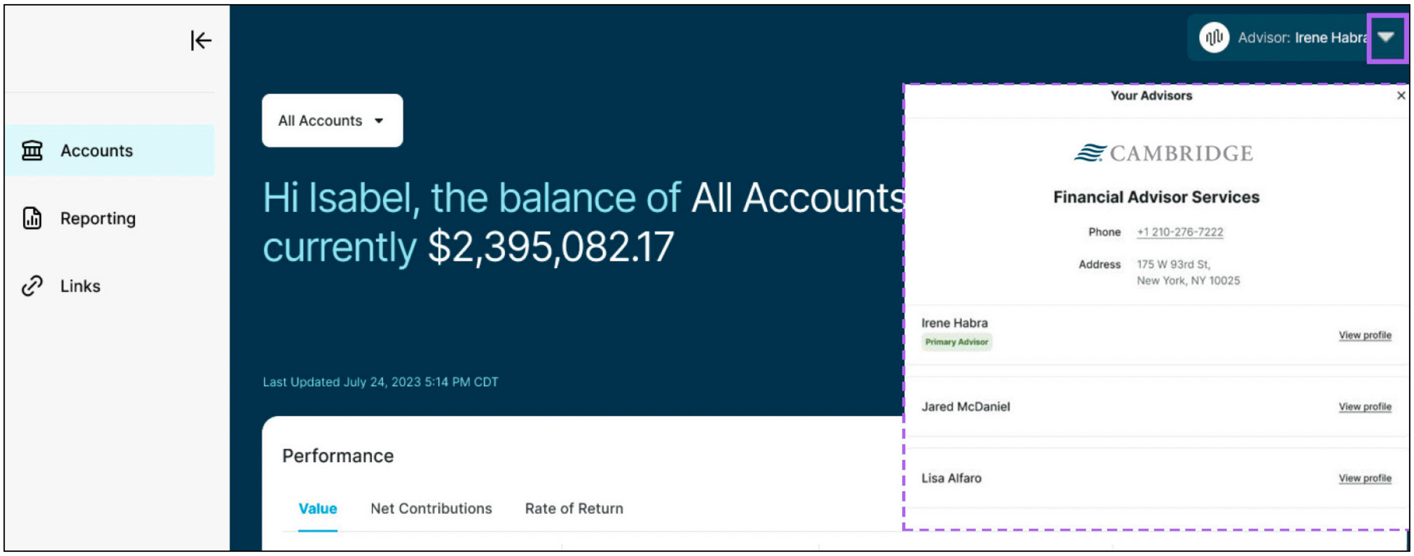
Personal Profile

Click your name in the bottom left corner to open the **My Information** dashboard.



Financial Professional Information

To find your financial professional contact information, hover over their name in the upper right corner.



1776 Pleasant Plain Road | Fairfield, Iowa 52556 | 800-777-6080