

True Link Portal Guide

How to log in and navigate the True Link Financial, Inc. Online Portal.

- Logging In - Portal Overview
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- The True Link Card Tab

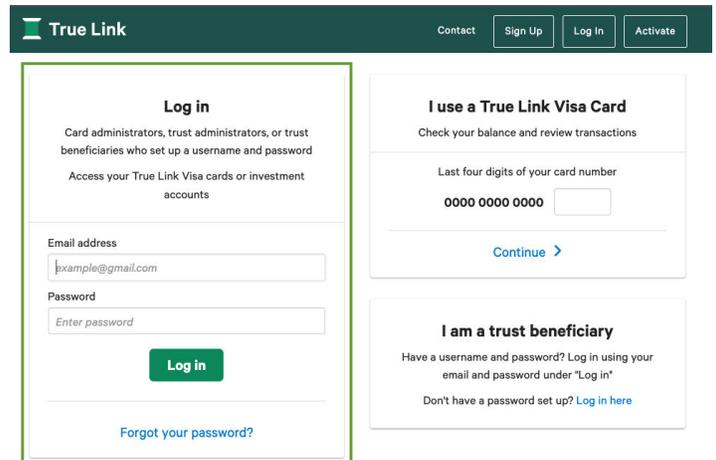
01 Logging in

1. Access the login screen here:
<https://member.truelinkfinancial.com/sign-in>
2. Select the section “I manage a True Link account” and,
3. Enter your email address,
4. Enter your password
5. Select “Log in”

Portal Overview

Once logged in, you will have access to:

1. View your account balance,
2. View and download trust statements,
3. View deposit and disbursement activity.



The screenshot shows the True Link login portal interface. At the top, there is a navigation bar with the True Link logo on the left and links for Contact, Sign Up, Log In, and Activate on the right. The main content area is divided into three sections:

- Log in:** This section is highlighted with a green border. It includes the heading "Log in", a sub-heading "Card administrators, trust administrators, or trust beneficiaries who set up a username and password", and a sub-heading "Access your True Link Visa cards or investment accounts". Below this are two input fields: "Email address" (with the placeholder "example@gmail.com") and "Password" (with the placeholder "Enter password"). A green "Log in" button is positioned below the password field. A link for "Forgot your password?" is located at the bottom of this section.
- I use a True Link Visa Card:** This section has the heading "I use a True Link Visa Card" and the sub-heading "Check your balance and review transactions". It contains a label "Last four digits of your card number" and a text input field with the placeholder "0000 0000 0000". A blue "Continue >" link is located below the input field.
- I am a trust beneficiary:** This section has the heading "I am a trust beneficiary" and the sub-heading "Have a username and password? Log in using your email and password under 'Log in'". It includes a link "Don't have a password set up? Log in here".

If you are also a True Link Visa® Prepaid Cardholder, you will have additional access to view:

1. Your True Link Visa card balance,
2. Visa Card Statements,
3. Visa Card Transaction history.

02

Statements Tab

Account Balance

At the top of the section, you will see the current total of your account balance. (Please note that the balance will not necessarily include any recent deposits, market fluctuations, interest, and dividends earned.)

Statements	Disbursements
Account Balance	Total: \$1,252.91

Download Statement

Choose the available quarterly statements you would like to review or keep for your records by selecting the available statement date from the drop-down menu. Select “Open” and the download will automatically commence.

Download Statement

Quarterly Statements: 2017-12-31

Deposits this quarter

This section will show you the deposits for the current quarter only. Please refer to the quarterly statements to see a full list of deposits by quarter.

Deposits this quarter	Total: \$500.00	
10 records per page	Search: <input type="text"/>	
Process Date	Description	Amount
11/05/2021	Annuity	\$500.00
Showing 1 to 1 of 1 entries		
<input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="1"/> <input type="button" value="Next"/> <input type="button" value="Last"/>		

03

Disbursements Tab

This section displays a historical running tally of the disbursements on your account and its current status and amount. Each disbursement has a status. Here's what the different statuses mean:

- **Requested:** This disbursement request has been received and is currently being reviewed.
- **Approved:** This disbursement has been approved and will be processed on the next business day (e.g. The disbursement has been approved and will be processed on the date indicated in the Processed Date column. If approved on a recognized holiday, it will be processed the next regular business day)
- **Processed:** This disbursement has been made but may not yet have been received by the recipient (e.g. the check has been mailed, the electronic payment has been issued.)
- **Cleared:** The recipient has received this disbursement (e.g. the check has been cashed, the electronic payment has been received.)
- **Not Approved:** This disbursement was not approved and will not be processed. If you have any questions, please reach out to your trust administrator.
- **Stopped:** This disbursement was approved, but the payment was canceled so it was not completed. If you have any questions, please reach out to your trust administrator.

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The True Link Card Tab

If you have a True Link Visa Card, you will also see the True Link Card tab on your portal dashboard.

If you have questions about any recent transactions, please contact your Trust Administrator.

You don't have a True Link Card? Ask your Trust Administrator if a True Link Card would be a good fit for you and your trust.

After selecting the “True Link Card” Tab, you have access to view your card’s current balance and card status (open, inactive, closed card), and options for viewing or downloading your transactions and statements. (More details below.)



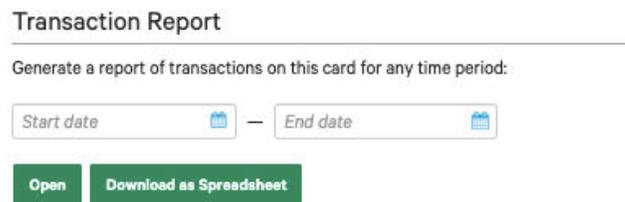
This Month’s Transactions

This section will only show a log of the current month’s transactions made on your True Link Visa® Card.

Transaction Report

View and download a custom time-period transaction report that will show all card transactions occurring on the card for the specified date range.

To create the report, select your desired date range and click “Open” and the report will open in a new tab. You also have the option to “Download as a Spreadsheet.”



Monthly Statements

To view or download a monthly statement, select the desired month and click “Open” and the report will open in a new tab. You also have the option to “Download as a Spreadsheet” or “Download as a PDF.”



Card Settings

The card settings section will take you to your True Link Visa Card's Spending Monitor. The Spending Monitor will tell you what types of purchases are allowed on your True Link Visa Card. If you have questions about your card settings including "Access to Cash", "Top Line Protections", "Merchant Settings" or "Additional Spending Categories", please contact your Trust Administrator.

Investment Advisory Services are provided through True Link Financial Advisors, LLC, (the "Adviser") an investment adviser registered with the U.S. Securities and Exchange Commission ("SEC") and wholly-owned subsidiary of True Link Financial, Inc. ("True Link Financial" and, together with the Adviser, "True Link") Registration with the SEC authorities as a Registered Investment Adviser does not imply a certain level of skill or training nor does it constitute an endorsement of the advisory firm by the SEC. True Link Financial, Inc. provides the trust administration software and record-keeping platform as well as the True Link Visa® Prepaid Card.

