True Link

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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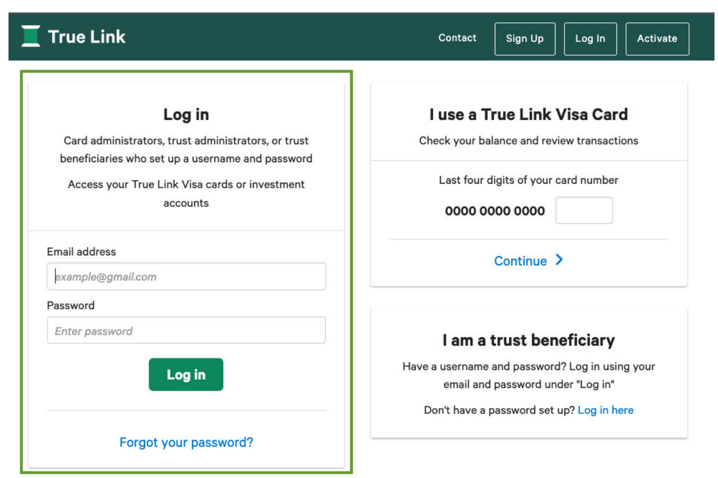
01 Logging in

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.

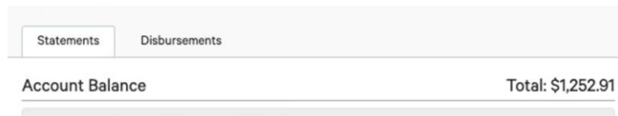
If you are also a True Link Visa® Prepaid Cardholder, you will have additional access to view:

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.)

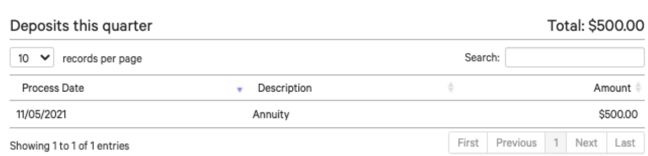


Download Statement

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.

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.



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.

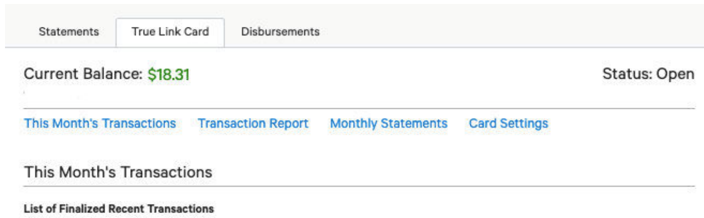
04 The True Link Card Tab

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.)



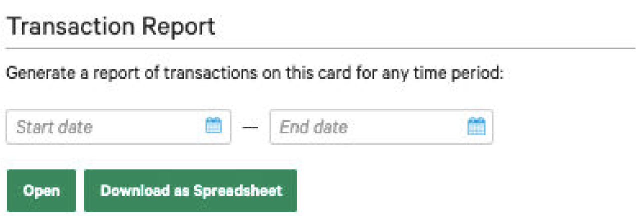
This Month’s Transactions

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

Transaction Report

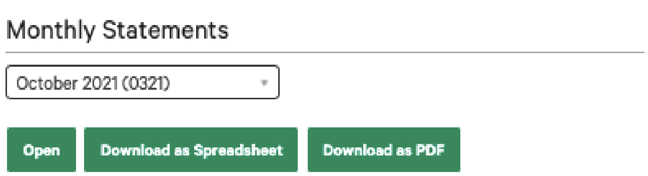
View and download a custom time-period transaction report that will show all card transactions occurring on the card for the specified date range.

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.