An aerial photograph of a river with clear, turquoise water. The riverbank on the left is covered in dense green vegetation and rocks. A person in a blue kayak is visible in the lower right portion of the river. The overall scene is bright and natural.

Tracking your wealth, your way.

A guide to your Wealth Management
online account.

The logo for First Interstate Wealth Management, featuring a stylized orange and red 'FI' monogram.

**First
Interstate**
Wealth Management

First things first: thank you.

Your trust is everything to us. We want you to be comfortable knowing how your finances are doing – where they stand, how they're performing, what's ahead.

This guide offers step-by-step instructions to access your account online.

If you have any questions, please contact your Wealth Advisor or Trust Specialist.



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Setting Up and Logging In

To access your account, go to firstinterstate.com and click **"Login"** in the upper right-hand corner of the screen. This will take you to a login page.

STEP 1

Select **"Wealth Management"** from the menu. Enter your **User ID** and **temporary password** that was provided to you. You will need to accept the Terms and Conditions to continue.

First Interstate Wealth Management

Contact Us

Welcome

User ID:
|

Enter your Password: [Forgot Your Password?](#)
| SHOW ⓘ

Register this device ⓘ

Continue >

[Login & Edit Security Profile](#)

By logging into this system, you signify your assent to our Terms and Conditions of Use and Privacy & Security Policy. If you do not agree to our Terms and Conditions of Use and Privacy Policy, you may not use this system.

[Disclaimer](#) | [Terms & Conditions](#) | [Privacy Policy](#)

STEP 2

A **one-time PIN** will be emailed to you. Check your email for the PIN, enter it, and click **"Continue Login."** You must enter the PIN within 20 minutes of receiving it, or your session will time out. If this occurs, you will need to request a new PIN.

First Interstate Wealth Management

Contact Us

Welcome Jane Smith

STEP 3: Your one-time PIN number has been emailed to you. Please check your email and enter your PIN below.

[One-Time PIN Send a new one-time PIN](#)

If you do not receive a one-time PIN, please contact your administrator.

|

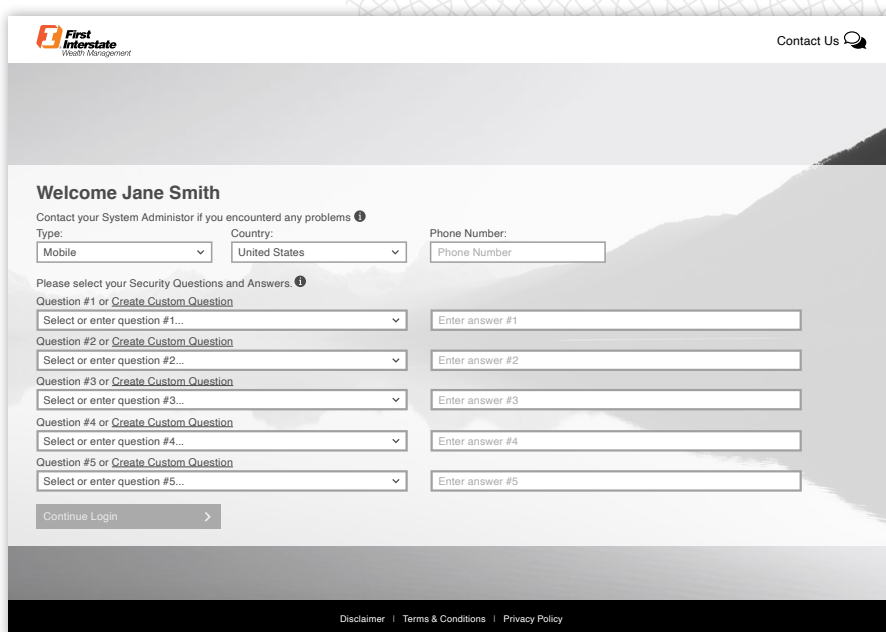
Click here to accept the Terms and Conditions and enable the one-time PIN entry box below.

Continue Login >

[Disclaimer](#) | [Terms & Conditions](#) | [Privacy Policy](#)

STEP 3

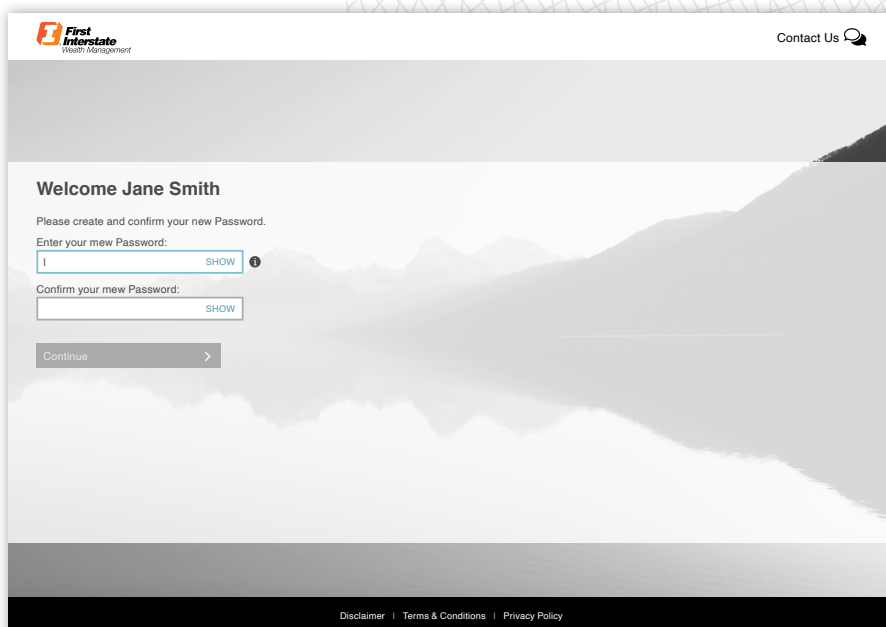
Enter your **phone number** (no dashes), and select **five security questions** from the dropdown lists.



The screenshot shows the 'Welcome Jane Smith' login page. At the top left is the 'First Interstate Wealth Management' logo, and at the top right is a 'Contact Us' link with a speech bubble icon. Below the header, the page says 'Welcome Jane Smith' and 'Contact your System Administrator if you encountered any problems'. There are three input fields: 'Type:' with a dropdown menu set to 'Mobile', 'Country:' with a dropdown menu set to 'United States', and 'Phone Number:' with a text input field. Below these is a section titled 'Please select your Security Questions and Answers'. It contains five rows, each with a dropdown menu for a question and a text input field for the answer. The questions are labeled 'Question #1' through 'Question #5'. At the bottom of this section is a 'Continue Login' button with a right-pointing arrow. At the very bottom of the page is a footer with links for 'Disclaimer', 'Terms & Conditions', and 'Privacy Policy'.

STEP 4

You will be prompted to change your password to a **new, custom password**.



The screenshot shows the 'Welcome Jane Smith' login page. At the top left is the 'First Interstate Wealth Management' logo, and at the top right is a 'Contact Us' link with a speech bubble icon. Below the header, the page says 'Welcome Jane Smith' and 'Please create and confirm your new Password.'. There are two input fields: 'Enter your new Password:' and 'Confirm your new Password:'. Each field has a 'SHOW' button with an eye icon to its right. At the bottom of this section is a 'Continue' button with a right-pointing arrow. At the very bottom of the page is a footer with links for 'Disclaimer', 'Terms & Conditions', and 'Privacy Policy'.

SECURITY TIP

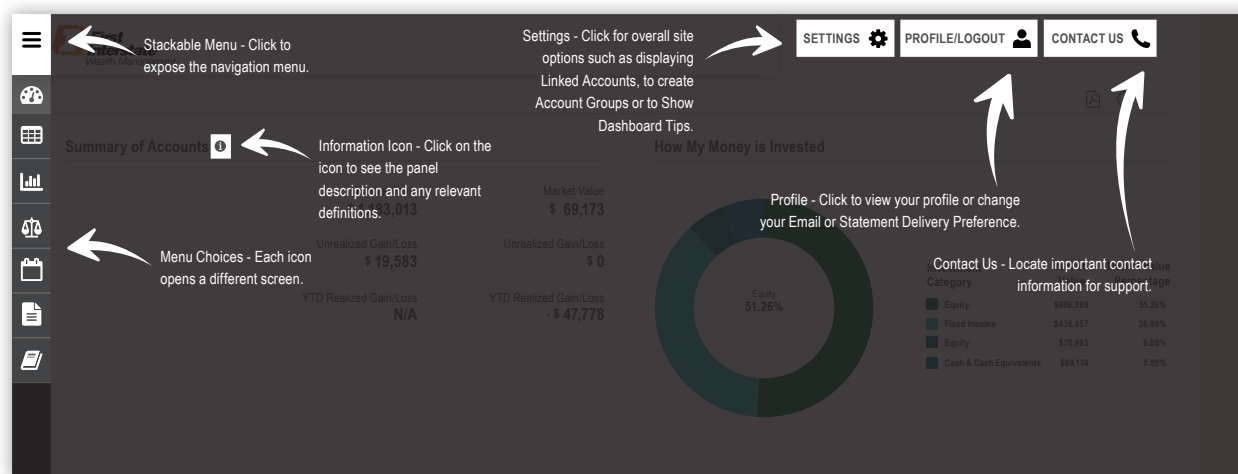
Your password should:

- Be between 8 and 20 characters
- Contain at least one number, one lowercase letter and one uppercase letter
- Not contain special characters < > or & and have no more than two repeating characters

Navigating Your Account

When you first log in, an overlay page with **simple instructions** on how to use key areas of the site will appear. It can be closed at the lower right-hand corner of the page, where the **"Don't Show Again"** checkbox appears.

Once you're comfortable with the controls, or if you do not want to see this page again, check the box, and it won't appear when you log in next time.




DID YOU KNOW?

You can download data to your personal Quicken software. From settings, click on **Authorize Quicken Access** and follow the steps outlined.



DASHBOARD

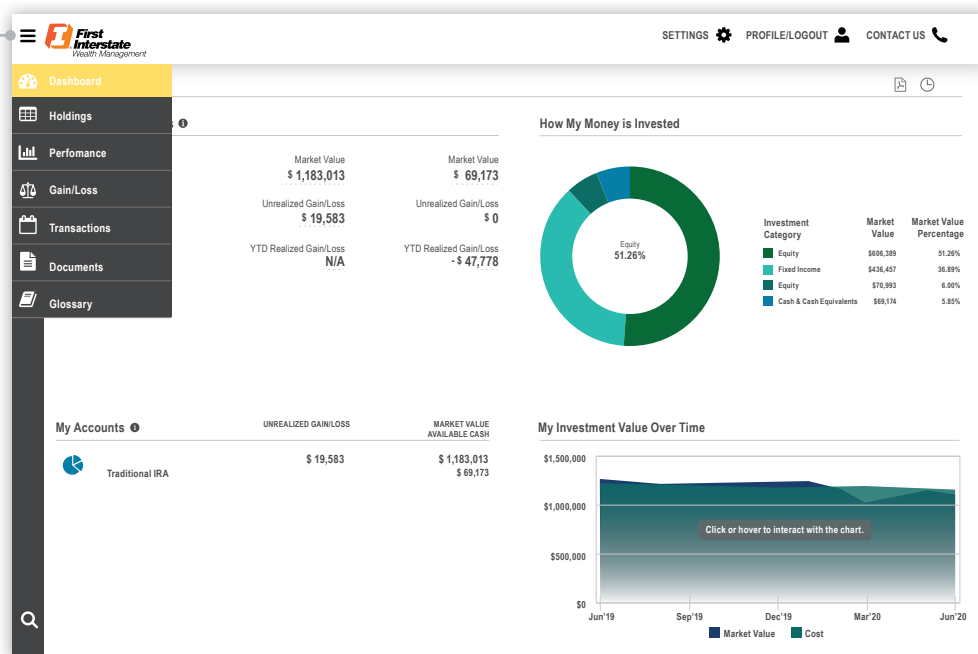
After logging in, your screen will show a **dashboard view** of your Wealth Management account, highlighting key aspects of your account(s) and access to more detailed information. You can easily customize what's displayed, making your most important information prominent and easy to see.

To customize your dashboard, click on the cog  or **Settings** icon and click on **"customize dashboard."** You can access this at any time by clicking on the dashboard icon on the left-hand side of the screen.

Icons and Account Information

Symbols along the left side of the screen display different information for your accounts: your holdings, performance, gain/loss, transactions, documents, and a glossary.

Clicking on the menu button, shown at right, expands the menu view.



HOLDINGS

Shows all the assets within your investment account(s). View all your accounts or a single account by using the account selector in the upper left-hand corner.

The top of the page displays a summary of your total Market Value, Total Cash, and Unrealized Gain and Loss for the account(s) you are viewing. Use the **"Select Group By"** dropdown above the table to group your assets by various categories, such as account name and number, portfolios, and investment category.

Use the **"Current Holding"** dropdown to view assets as of the end of the previous business day, month, quarter, year, or a specific date.

Additional icons above the right side of the table allow you to search, customize columns in the table, download, print, and view the last time the page was updated.



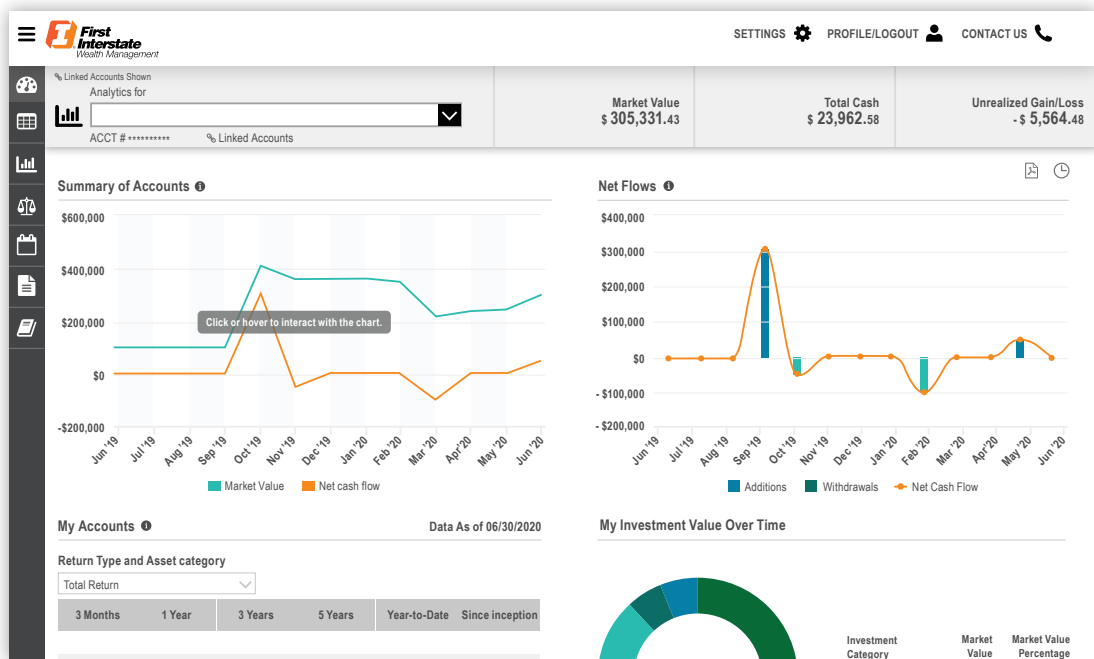
PERFORMANCE

Displays the market value, cash flow, performance, and how the money in your account(s) is invested. The dropdown menu lets you view the total return for your account or for specific asset classes in your account.

Market Value Over Time gives a view of the account market value fluctuation. Benchmarks for your account are displayed beneath your Market Value Over Time in the Performance section.

Net Flow shows the trend of money flowing into and out of your account by date and dollar amount.

At the bottom right of the screen, you can see how your money is invested.



GAIN/LOSS

Shows the amount of gains or losses from the sale of securities or capital gain distributions. Detail view displays all transactions that resulted in a gain or loss.

Toggle between data for the current calendar year or use the filter at the top of the table to view previous calendar year gains and losses. Summary view provides a list of your short and long-term gains and losses for the current calendar year and previous calendar year, as well as displays your unrealized gains and losses.

Additional icons above the right side of the table allow you to customize the columns in the table, download, print, and view the last time the page was updated.



TRANSACTIONS

Displays account transactions by date, type, and description, including the price and amount. Transactions can be filtered to show additions or withdrawals.

You may also select several different date ranges for display; if no transactions match the specified account, transaction type, or time period, a "No Records to Display" message appears.



DOCUMENTS

Access your online document library here. View statements and other documents applicable to your account(s) – for all your accounts, or by single account using the selector in the upper left-hand corner.

The top of the page displays a summary of your total Market Value, Total Cash, and Year-to-Date Net Change for the account you are viewing. See your documents by selecting the appropriate folder.

Click the PDF icon to open your document in a new browser tab. Once open, you can view, print, or save a copy of the document.

The dropdown menu in the left-hand corner below the header ribbon lets you select the time period for which you want to view your documents.

Additional icons above the right side of the table allow you to download, print, and view the last time the page was updated.



GLOSSARY


Definitions of terminology used on the site. An alphabetical header at the top of the page lets you quickly find and view relevant words and terms, then select each to learn more. Letters without words in the glossary are gray; those that have words are black.

You may also type in a word or term to search for its definition in the glossary.

Locating Statements

Information for your account(s) is available with paper statements or electronic statements online. Each statement details account activity and income earned for each period, compared with year-to-date. Colorful graphs illustrate your asset allocation at a glance.

To view online statements, click on the "Documents" icon, located on the left-hand side of your online account portal. Select the **time period** you'd like to see, then click on the "Statements" folder. You can see all statements available for each account to the right of the page.


June 1, 2020 - June 30 2020

Overview of Your Account

Investment Objective: Income with Growth

Activity Summary

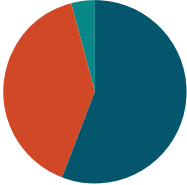
	This Period (\$)	Year to Date (\$)
Beginning Market Value	464,791.31	491,825.41
Cash and security transfers	0.00	0.00
Contributions	0.00	0.00
Income & Capital Gain Distributions	1,302.32	5,484.33
Withdrawals and fees	-774.34	-955.726
Change in Account Value	6,546.48	-15,886.68
Market Value on Jun 30, 2020		

Income Earned

	This Period (\$)	Year to Date (\$)
Taxable Income	464,791.31	491,825.41
Tax-Exempt Income	0.00	0.00
Tax-Deferred Income	0.00	0.00
Total Income Earned	0.00	0.00
Total Short Term Realized Capital Gain/Loss	0.00	0.00
Gain/Loss	0.00	0.00
Total Long Term Realized Capital Gain/Loss	0.00	0.00
Total Realized Capital Gain/Loss	0.00	0.00

Asset Allocation on June 30, 2020

	Market Value (\$)	Percent
Fixed Income	262,298.79	56%
Equity	19,235.18	40%
Alternatives	19,235.18	4%
Cash & Cash Equivalents	1,192.28	0%
Total of Your Account	\$471,865.80	100%

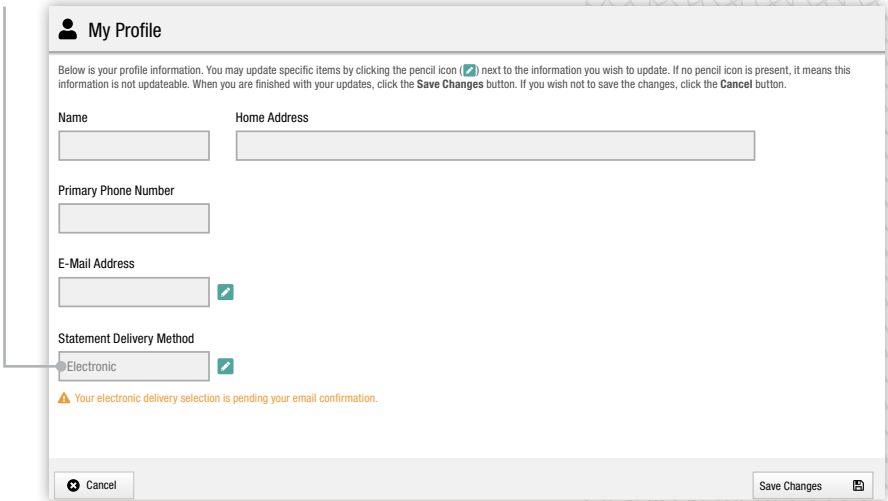


NOTE

Non-calendar, year-end reporting is not available. Documents, including statements and tax reporting, are based on calendar year.

Enrolling in E-Delivery

As soon as your statements are available online, we'll send you an email. You can then opt-out of mailed paper statements and review them entirely online instead.



Signing up for E-delivery of statements is easy:

- Go to the **Profile/Logout** icon
- Click the **My Profile** option to view basic personal information
- Click the **pencil icon** to change how you receive statements
- Change the delivery method from **Print** to **Electronic delivery**
- Click **Save Changes**
- Look for an email confirming your enrollment in E-delivery

IMPORTANT

For your account security, you must **confirm** your election of E-delivery by clicking the link in the confirmation email **within 72 hours** of your enrollment. Otherwise, changes will not take effect and paper statements will continue to be mailed.

TIP

Email Address Changes

To update your registered email address, login to your account, click the **Profile/Logout (1)** icon in the upper right-hand corner of the home page. Select "**My Profile.**" **(2)** Click the **pencil icon (3)** next to your email address to update your email. When done, click the **Save Changes (4)** button in the bottom right-hand corner.

Troubleshooting

I forgot my Temporary Password or User ID.

Contact your Wealth Advisor or Trust Specialist for assistance. You can also contact First Interstate Wealth Management at 888-791-4075 or middle.office@fib.com

NOTE: Your User ID may become inactive if you don't login every 180 days. If this occurs, contact your Wealth Advisor or Trust Specialist to re-activate your User ID.

I forgot the answers to my security questions.

Enter your User ID and Password, and click on **"Login & Edit Security Profile."** To update your security questions, select **"Phone Number / Security Questions"** and click **Update** when finished.

I forgot my password.

Click the **"Forgot Your Password?"** link on the security page. You will be prompted to answer two security questions.

Once you've answered the questions, click on **"Continue Login."** A **one-time PIN** will be sent to your registered email address. Enter the one-time PIN to continue.

Login & Edit Security Profile



Phone Number / Security Questions

When I tried to log in, I received an "Access Request Denied" error.

Simply close your web browser and re-open to start a new session.

I received a session time-out error.

Timing out is a security precaution to ensure no unauthorized users have access to your account information. You may get this message if you have been inactive for too long, or because a previous session was not closed. To resolve this issue, close the web browser completely and re-open to start a new session.

I've registered my device, but I'm still being prompted to answer my security questions.

Security questions are prompted when the site does not recognize the device or browser you are using to log in, or if you've cleared your browser history/cookies. This is simply a security measure to ensure only authorized users are accessing your account information.



Let's talk wealth management, person-to-person.
 Contact your Wealth Advisor or Trust Specialist
 or you may contact us at
888-791-4075



Find the branch nearest you
firstinterstate.com/locations/

Branch locations with address, phone number, hours, and ATM information, too.



On the go? Get on the app

Our Mobile Banking app puts the convenience of mobile check deposits, 18 months of transaction search history, balance and payment push notifications, internal transfers, and more, right in your hand. Search "First Interstate Bank" in the Google Play and Apple App stores.



Online Banking, for personal and business accounts
firstinterstate.com

Securely manage your accounts from any computer, anytime.



Bank by phone
888-752-3341

Enjoy the convenience of First Interstate Bank's 24-hour Day & Night Telephone Banking. Have your account and PIN number(s) handy.



firstinterstate.com

Not Bank Guaranteed	Not Bank Deposits or Obligations	Not Insured by FDIC or Any Other Government Agency	May Lose Value
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