



TRUST FOR GENERATIONS
www.bridgestrust.com

BRIDGES TRUST ONLINE
BT Online | User Experience Guide



Download the Bridges Trust Online App from the Apple App Store or Google Play

Please click on the link below as it pertains to your mobile device. This link will allow you to download the Bridges Trust Online app for your device:

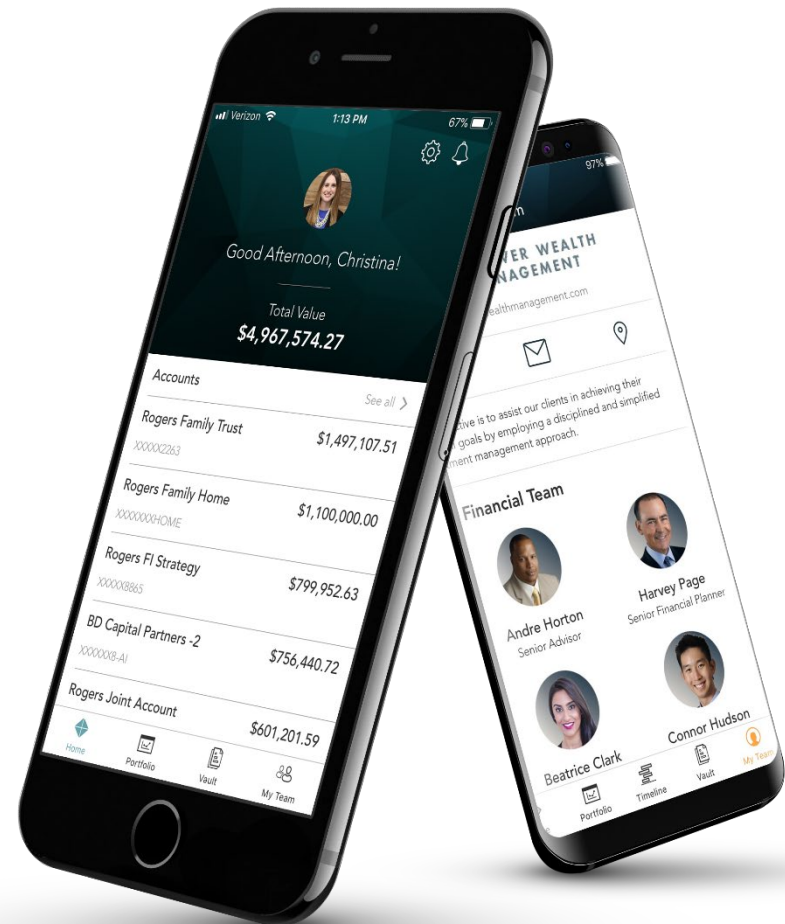


APPLE USERS - Click [HERE](#)

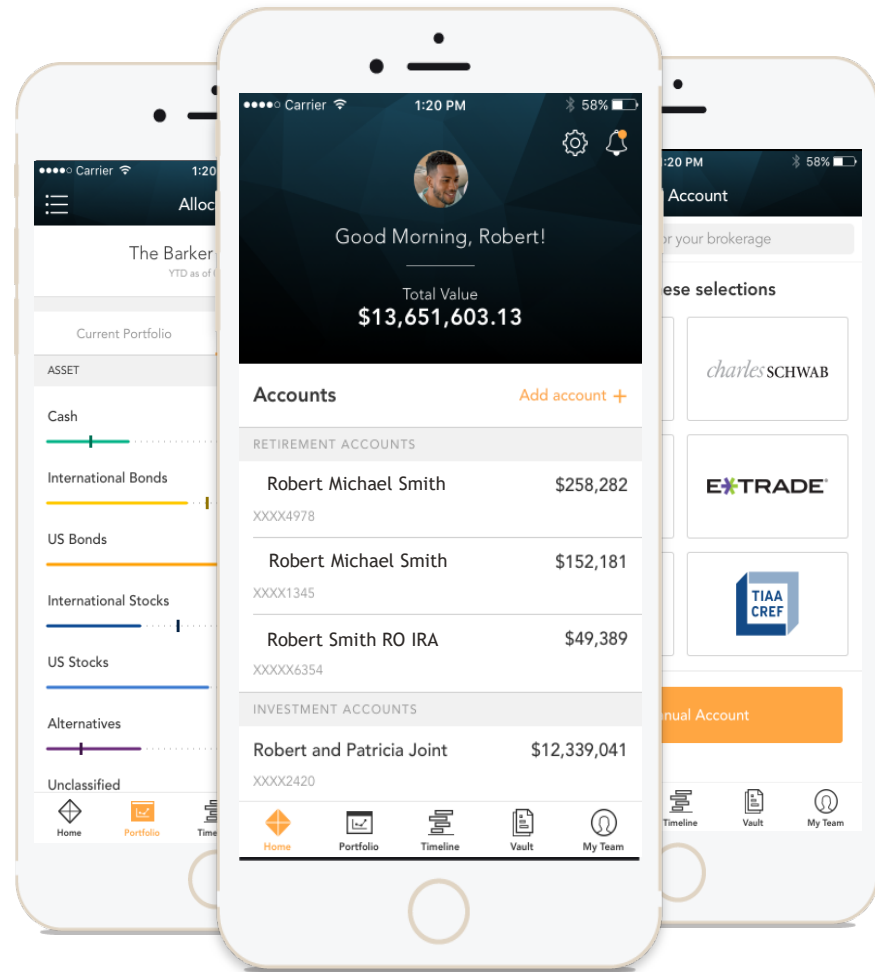


ANDROID USERS - Click [HERE](#)

Bridges Trust Online App Icon



From your portal, you have access to unique information and insights, account details, your investment dashboard, a document vault, instant access from any of your devices, and more.



The following content will guide you through the three main areas of your personalized Bridges Trust Online Portal.

1. Home Page

At-a-glance view of pertinent account information

2. Portfolio

Dynamic view of your entire portfolio

3. Vault

Easily keep track of and share important financial and legal documents

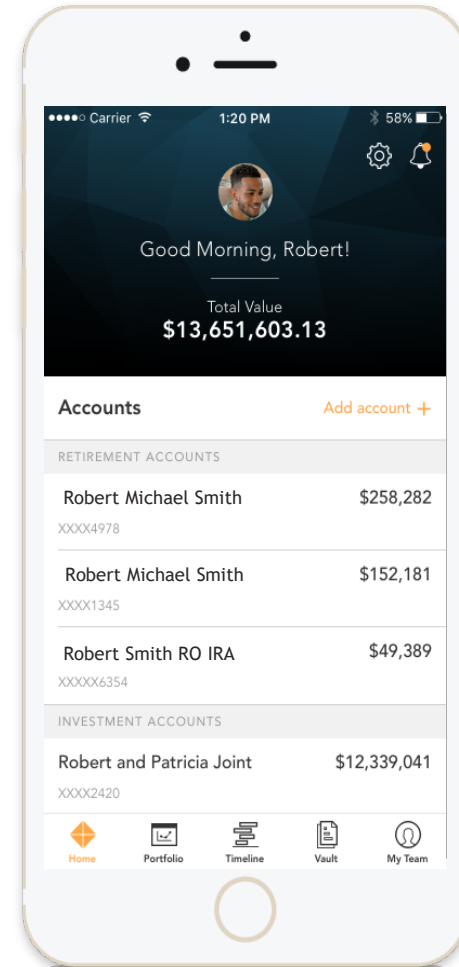
Login Questions & More

Helpful hints and expanded views of features

When you log in, you'll see your personalized home page. Across the top, you have quick access to the other pages of your portal.

Your accounts and total portfolio value are listed front and center. Next to your accounts, you'll also find your top holdings for quick reference.

You can stay connected to your Bridges Trust Client Service Team with clickable links to phone numbers, emails, and office locations.



View notifications from your advisor

Good Morning, Christina!

Total Value
\$5,017,475.46

Accounts

Brokerage

Joint Account	\$601,201.59
Individual	\$49,901.19

Mortgage

Rogers Primary Mortgage	-\$381,421.35
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Retirement

Rogers FI Strategy	\$799,952.63
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Nick Rogers IRA	\$288,301.53
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Trust

Rogers Family Trust	\$1,497,107.51
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Rogers Irrevocable Trust	\$149,083.21
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BRIDGES TRUST

https://www.bridgestrust.com

402.393.8300

13333 California Street, Suite 500, Omaha, NE 68154

About Us

Like you, our philosophy encompasses the core values that shape how we do business, what we aspire to achieve for our high net worth clients, and how we aim our contributions in asset acquisition and wealth management.

Since 1945, our philosophy encompasses trust, service, excellence, and integrity. It is an expression of who we are and what sets us apart. These fundamental values fuel our passion for helping you achieve your goals and bring your wealth management vision to life.

My Financial Team



Megan McMurry
Relationship Manager



Matt Eglseder
Portfolio Manager



Dawn Hansen
Client Service Manager

Watch List

Manage Watch List >

SSNC 57.17

SS&C TECHNOLOGIES HLDGS INC COM -0.24

Quickly view your accounts as an aggregate total or grouped by category

Communicate or schedule an appointment with your financial team directly

Pick and choose stocks, ETF and mutual funds that matter to you to track daily

Next: Expand your Top Holdings

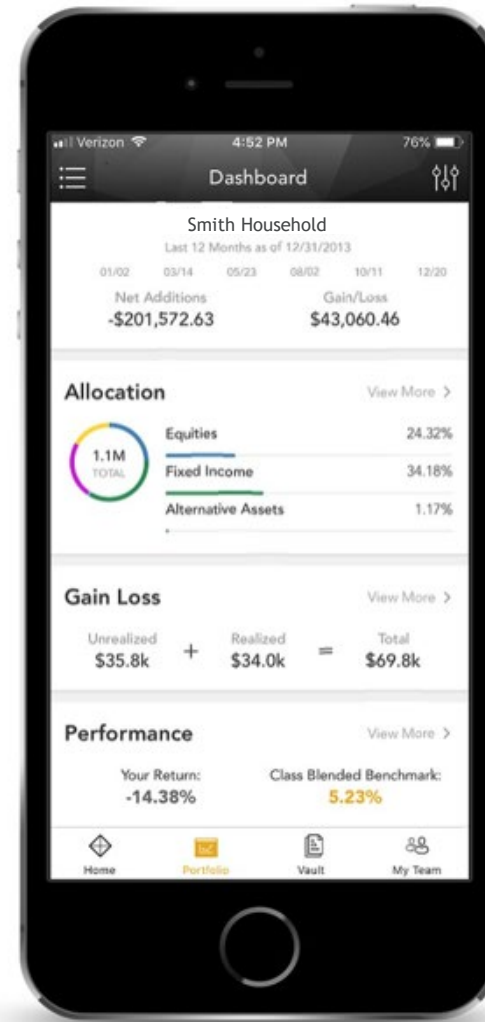
The screenshot displays the Bridges Trust home page. At the top, there is a navigation bar with the following items: HOME, NET WORTH (with a dropdown arrow), PORTFOLIO (with a dropdown arrow), TIMELINE, and VAULT. The main content area is divided into two columns. The left column is titled 'Trust' and lists several trusts with their net worth values: Rogers Family Trust (\$1,497,107.51), Rogers Family Trust (\$1,365,935.91), Charles Family Trust (\$267,510.13), and Rogers Irrevocable Trust (\$149,083.21). Below this is an 'Education' section listing Michelle's 529 (\$115,130.21), Rogers 529 (\$41,126.11), and Connor's 529 (\$11,488.44). The right column features a 'NET WORTH' section with an 'Add Symbol' button and a '+'. Below that is a 'Top Holdings' section listing various assets and their percentages: XOM (13%), ROGERS HOME (13%), DFSMX (9%), CHDVX (5%), VDIGX (4%), DFTIX (3%), CVSIX (2%), CASH (2%), SAMBX (2%), and FPACX (2%). A callout box with an arrow pointing to the 'Top Holdings' section contains the text 'View your top holdings at a glance'.

Next: Portfolio - A dynamic and personalized view of your portfolio

The Portfolio dashboard is where you can view additional details about your portfolio. The dashboard gives you a dynamic overview of your portfolio with performance cards highlighting key information of your portfolio.

To get even more detail, you can click on the title of each card. You can also use the drop-down menu to switch between the different cards quickly.

All of this is completely customizable using the filters to select specific date ranges, portfolios, or accounts.



HOME PORTFOLIO ▾ VAULT

Smith Household ▾ Filter

Change your portfolio or filter for specific accounts

Quarter To Date as of 12/31/2015 ! ⚙

Update Supervised and Performance Return settings

Activity Summary >

Beginning Value 3,638,764.70

Net Additions 242,897.54

Gain/Loss 100,813.21

Ending Value 3,982,475.46

Allocation >

4.0M

Group By: Classes ▾

Equities	58%	2,302,709.73
Fixed Income	26%	1,031,065.75
Alternative Assets	10%	394,600.65
Cash & Equivalents	6%	245,141.14
Unclassified	0%	8,958.79

Performance >

Rogers Family

2.65%

Gain Loss >

Unrealized	1.8M	+	Realized	-43.7K	=	Total	1.8M
Unrealized Gain/Loss							1,805,876.70
% UGL							31.55%
Short-Term							249,116.05
Long-Term							1,556,760.65
Realized Gain/Loss							-43,662.01
% RGL							-35.87%
Short-Term							-10,183.78
Long-Term							-33,478.24

Transactions >

Date	Type - Symbol	Amount
12/31/15	Management Fee - CASH	-122.70
12/31/15	Management Fee - CASH	-122.70
12/31/15	Management Fee - CASH	-65.26
12/31/15	Income Reinvestment - GMBXX	0.11
12/31/15	Dividend - GMBXX	0.11
12/31/15	Buy - GMBXX	0.11
12/31/15	Management Fee - CASH	-444.81
12/31/15	Management Fee - CASH	-444.81
12/31/15	Management Fee - CASH	-236.55
12/31/15	Management Fee - CASH	-692.30

For illustrative intent. Not all accounts will share these exact dashboard features.

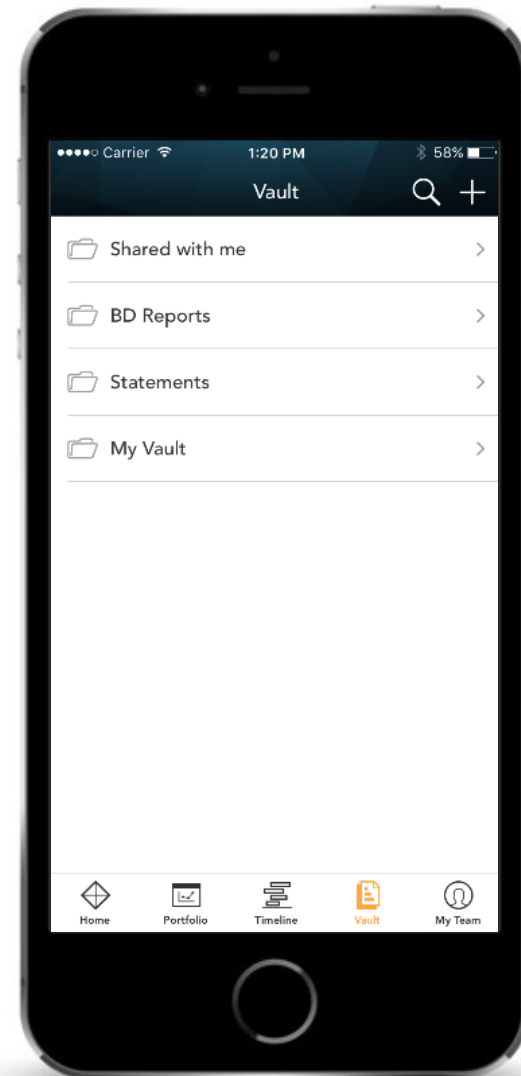
Next: The Vault - an improved way storing and updating your important legal and financial documents

Securely sharing and managing documents is key to working with your wealth management team. The Vault page is where you can keep track of your important financial and legal documents.

From here, you can organize your documents into folders, drag-and-drop to upload new documents, and easily move files from one folder to another.

The Vault is also an area where we can share documents with each other through the Shared Folders option.

From the Statements and Reports folders, you have quick access to view investment focused reports created by your financial team.



Securely store documents/files, share items with your financial team, view generated reports and custodial statements

- Shared With Me
- Reports
- Statements
- Statements

My Files

Rename
Share
Move
Download
New

	Name	Owner	Last Modified	File Size
<input checked="" type="checkbox"/>	Michael's Documents	M. Persin	05/08/2018	--
<input type="checkbox"/>	Tax Documents	M. Persin	05/08/2018	--

Michael's Docume...

Mike Persin
Owner

05/08/2018 --
Created On Size

Quickly edit, move or download your files as needed

Drag and drop your files into the document space to upload

LOGIN ISSUES



How to access your account if you have trouble signing into the site

Examples of errors you may encounter

Error! Your user account has been locked. Please click "Trouble logging in?" to unlock your account.

Error! Invalid username and password combination.

Select "Trouble logging in?" on the sign-in page for help

Username 
Password 
Sign In
[Trouble Logging In?](#)

Trouble logging in?
What's the problem?

[I forgot my password.](#)

[I forgot my username.](#)

[I need to unlock my account.](#)

You will receive an email with a link to access the site

Follow the steps provided to resolve login issues

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Please click on the following to reset your password:

[Reset Password](#)

Or, paste this link into your browser:

[Bridges Trust Online Password Rest Link](#)

If you did not request this password reset, please contact your Bridges Trust Relationship Manager at 402.393.8300.

Thanks,
Bridges Trust



Your personalized portal keeps you connected to your financial life, your advisory team, and everything else you need for managing your wealth.

BRIDGES | TRUST®

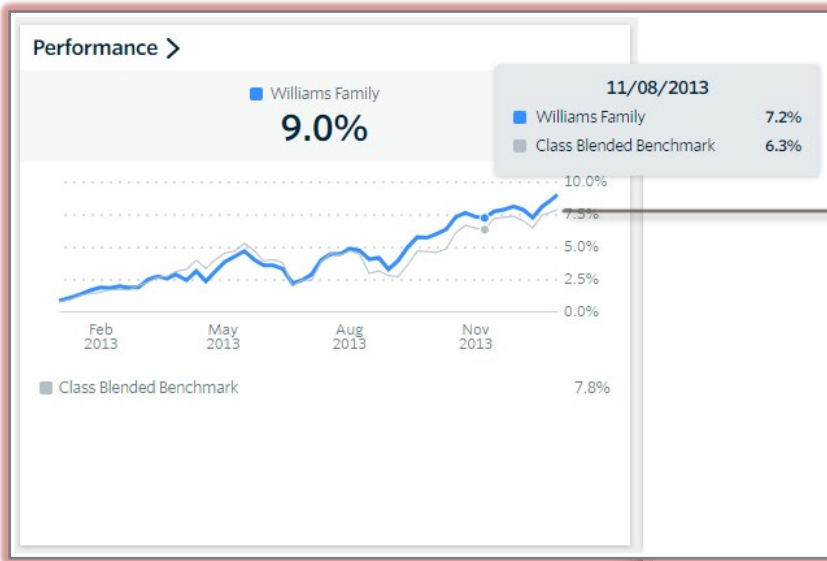
If you have any questions, please contact us.
It's our pleasure to assist.

Phone: 402.393.8300
Email: contact@bridgestrust.com

APPENDIX

PERFORMANCE CARD

View investment performance across your portfolio



(Consolidated View)

Hover to view returns through a specific date

Change your view to see multiple date ranges or market analytics

Expand and collapse the grouped sections

MIKE DEMO TEAM

VAULT [Back to IX 1.0](#) MIKE

Year To Date as of 12/31/2013

Overview Details Analytics

Group By: Classes | Expand Level - Collapse All

Name	As of 12/31/2013		Year To Date	
	Allocation	Return	Gain/Loss	
▼ Williams Family	100.0%	9.0%	2,765,338	
Class Blended Benchmark		7.8%		
> Equities	36.0%	27.6%	2,563,294	
S&P 500 INDEX		29.6%		
> Fixed Income	60.0%	0.6%	116,932	
BLOOMBERG BARCLAYS AGGR BOND INDE...		-2.0%		
> Alternative Assets	3.3%	7.7%	84,970	
6% ABSOLUTE RETURN		6.0%		
> REITS	0.0%	-2.4% ¹	31	
DOW JONES WILSHIRE U S INDEX REAL EST...		-1.0%		
> Cash & Equivalents	0.8%	0.0%	111	
90 DAY TREASURY BILL		0.0%		

¹ Not held for the entire period

Williams Family 9.0%

Return Market Value Risk vs Return

10.0%
7.5%
5.0%
2.5%
0.0%

Feb 2013 May 2013 Aug 2013 Nov 2013

■ Williams Family ■ Class Blended Benchmark

(Expanded View)

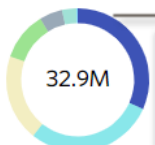
ALLOCATION

View the allocation breakdown of your portfolio

Allocation >

Group By: Account/Class v

XXXX4442 - Williams - Alliance Bernstein	31.74% 10.44M
XXXXX2303 - Williams Trust - PIMCO	28.99% 9.53M
XXXX7621 - Williams Foundation	19.57% 6.44M
XXXXX5416 - Williams Rev Trust	10.95% 3.60M
XXXXX2968 - Williams Managed Growth Fund	5.18% 1.70M



12/31/2013

XXXX4442 - Williams - Alliance Bernstein

Actual: **10,435,640**

Weighting: **31.7%**

Hover to view grouping level allocation detail

(Consolidated View)

Change the data grouping from the dashboard or the expanded card

Group By: Account/Class v | Expand Level | Collapse All

Williams Family

Filter

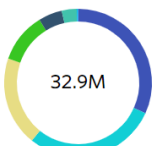
Year To Date as of 12/31/2013

< Allocation

Snapshot

Drift

Collapse Chart



XXXX4442 - Williams - Alliance Bernstein	31.74% 10.44M
XXXXX2303 - Williams Trust - PIMCO	28.99% 9.53M
XXXX7621 - Williams Foundation	19.57% 6.44M
XXXXX5416 - Williams Rev Trust	10.95% 3.60M
XXXXX2968 - Williams Managed Growth Fund	5.18% 1.70M

< Previous 1 / 2 Next >

Name	Symbol	Units	Allocation of Total	Ending Value
Williams Family	--	--	100.0%	32,879,952
> XXXX4442 - Williams - Alliance Bernstein	--	--	31.7%	10,435,640
> XXXX7621 - Williams Foundation	--	--	19.6%	6,436,044
> XXXXX2303 - Williams Trust - PIMCO	--	--	29.0%	9,532,897
> XXXXX2968 - Williams Managed Growth Fund	--	--	5.2%	1,703,995
> XXXXX5416 - Williams Rev Trust	--	--	10.9%	3,600,059
> XXXXX6082 - Tina Hickson	--	--	0.3%	90,994
> XXXXX6-AI - BD CAPITAL PARTNERS	--	--	3.3%	1,080,322

(Expanded View)

Toggle your view between a single day snapshot and a drift chart for allocation over time

ALLOCATION VS TARGET

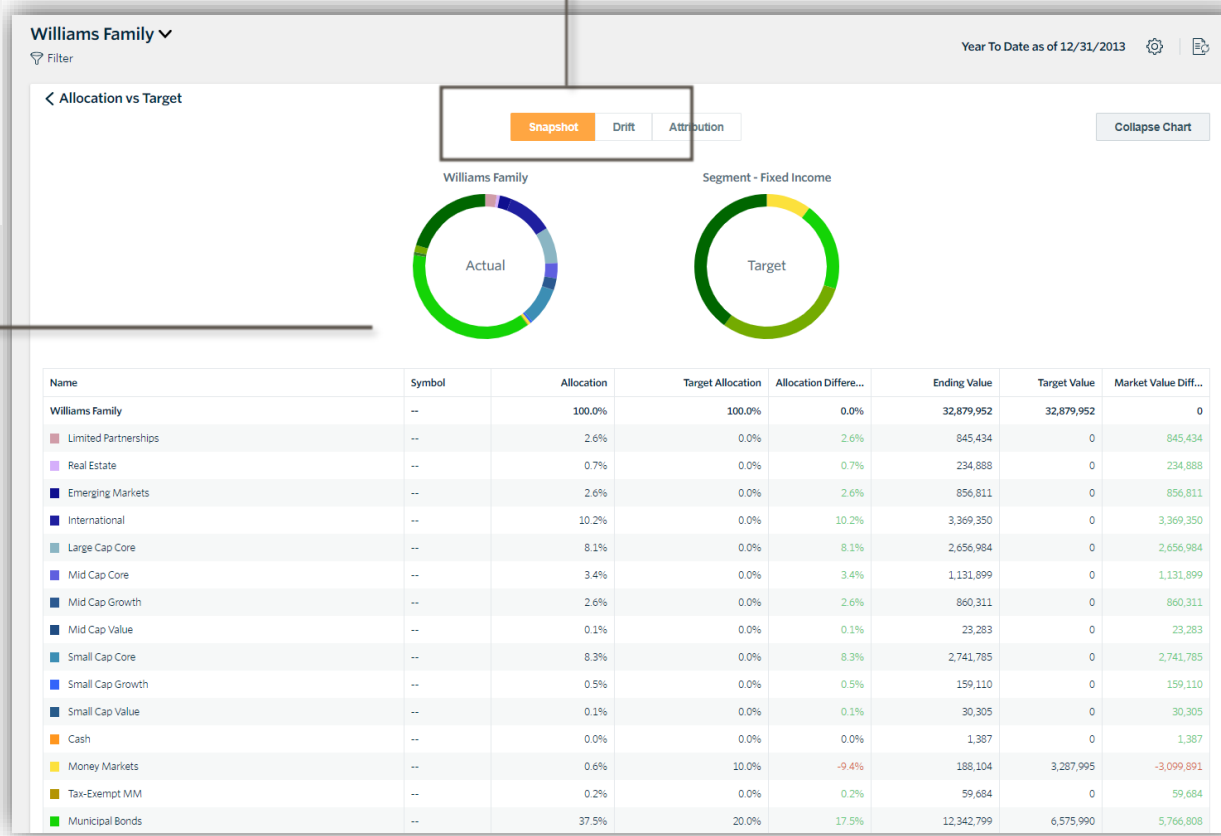
Compare your current allocation to your portfolio targets



(Consolidated View)

Quickly view your current allocation relative to your target

Compare your allocation to your target on a single day in snapshot, compare for a period of time using drift charts or view the cap/sector breakdown in attribution



(Expanded View)

Hover over the donut chart to view grouping level allocation detail

ACTIVITY SUMMARY

View activity and changes in your portfolio or account balance



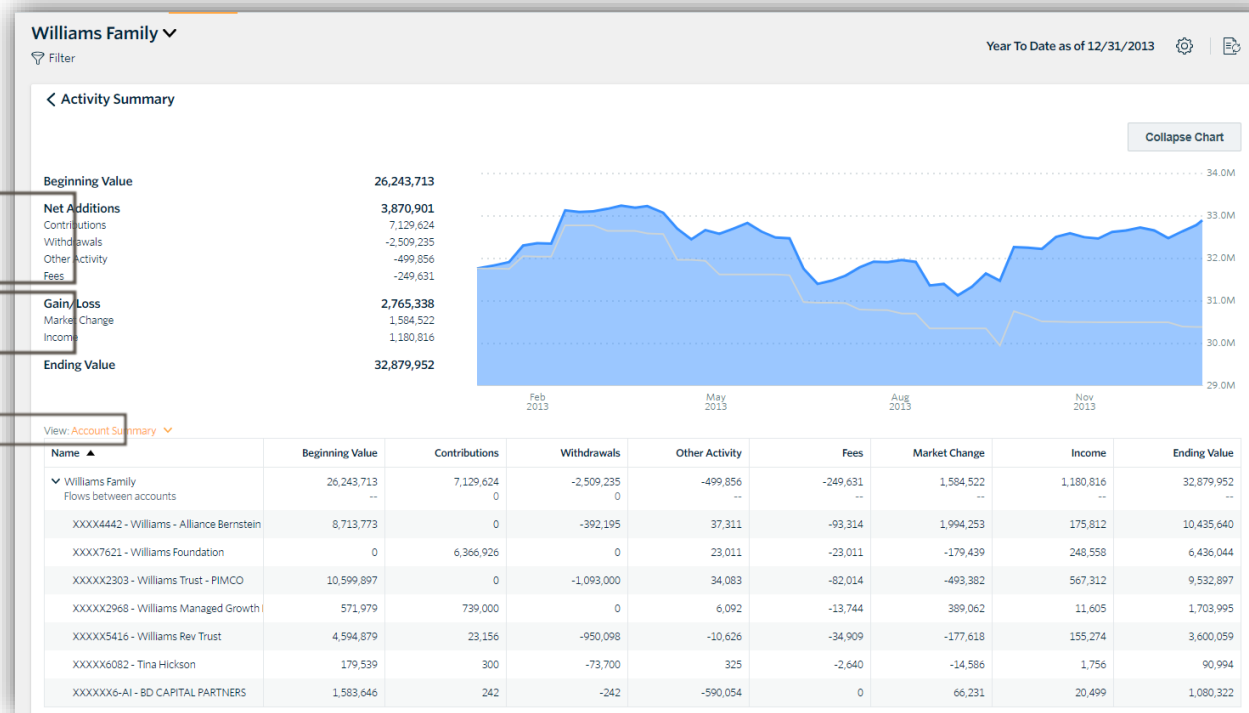
Hover over graph to view net addition and market value information for a specific date

(Consolidated View)

View breakout of additions and withdrawals

See income and performance breakouts

Toggle to view either summary detail or transactions



(Expanded View)

View realized and unrealized gain/loss information for your investments

Gain Loss >

Unrealized	+	Realized	=	Total
1.4M		9.8K		1.4M
Unrealized Gain Loss				1,380,914
% UGL				5.41%
Short-Term				227,571
Long-Term				1,153,343
Realized Gain Loss				9,785
% RGL				91.32%
Short-Term				--
Long-Term				9,785

(Consolidated View)

View your high-level gain/loss breakdown from the dashboard

Sort column headers to quickly organize your cost basis information

Williams Family Filter Year To Date as of 12/31/2013 Settings Print

< Gain Loss

Group By: Account/Class | Expand Level - Collapse All

Name	Symbol	Open Date	Units	Cost Basis	Price	Accrual	Ending Value	Unrealized ST	Unrealized LT
▼ Williams Family	--	11/26/2008	--	25,504,539	--	170,188	32,879,952	227,571	1,153,343
> XXXXX6-AI - BD CAPITAL PARTNERS	--	11/26/2008	--	658,884	--	0	1,080,322	12,817	408,621
> XXXX6082 - Tina Hickson	--	01/14/2013	--	74,447	--	28	90,994	2,347	--
> XXXX4442 - Williams - Alliance Bernstein	--	09/10/2012	--	10,087,945	--	0	10,435,640	3,397	173,269
> XXXX7621 - Williams Foundation	--	01/23/2013	--	1,320,139	--	0	6,436,044	-24,283	--
> XXXX2968 - Williams Managed Growth Fund	--	02/14/2013	--	847,690	--	478	1,703,995	187,223	--
> XXXX5416 - Williams Rev Trust	--	09/19/2012	--	3,082,653	--	45,822	3,600,059	-7,227	524,632
> XXXX2303 - Williams Trust - PIMCO	--	11/01/2012	--	9,432,780	--	123,861	9,532,897	53,297	46,820

(Expanded View)

Expand and collapse the grouped sections

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If you have any questions, please contact us.
It's our pleasure to assist.

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