



**FIRST REPUBLIC TRUST COMPANY**

It's a privilege to serve you®

## **WebLink New User Guide**

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# First Republic Trust Company Internet Access

## Welcome to Weblink

### **FIRST REPUBLIC TRUST COMPANY WELCOMES YOU TO WEBLINK.**

The Weblink product provides you with access to your investment portfolio 24 hours a day. The only thing you need is either an Internet Explorer or Netscape browser. The browser support policy is to support the two latest browser versions. Weblink currently supports IE 6.0 and 7.0, Netscape 6.6, 7.0, and 8.0 and Firefox 2.0 on both Windows and MAC.

Although you can continue using Apple Macintosh and Internet Explorer to access Weblink, we recommend that you switch to one of the following web browsers that are also supported for Weblink and that have been tested.

These include: Safari 1.3.1 (v 312.3.3) and Netscape 7.2 which are both operational under Apple's MAC OSX operating system.

Weblink's optimal viewing resolution is either 800x600 pixels or 1024x768 pixels with at least 32,768 colors. However, Weblink style sheets and fonts have been developed to minimize the impact of high resolutions and changes in browser or desktop fonts.

Data transmission security is implemented via SSL (Secure Socket Layer).

**PLEASE REVIEW YOUR SETTINGS AND CHANGE THEM ACCORDINGLY TO ENSURE YOUR INFORMATION DISPLAYS CORRECTLY.**

## Internet Explorer Browser Settings

Open your browser and select the following settings:

Tools ->Internet Options->General Tab->Temporary Internet Files	Select SETTINGS	Click EVERY VISIT TO THE PAGE
Tools->Internet Options->Content>Autocomplete	Place Check Mark	Check the FORMS box
Tools->Internet Options->Advanced Tab	Browsing/Underline Links	Select the HOVER radio button
Tools->Internet Options->Advanced Tab	Security	Check EMPTY INTERNET TEMPORARY FILES FOLDER WHEN BROWSER IS CLOSED box.
Tools->Internet Options->Advanced Tab	Printing	Check PRINT BACKGROUND COLOR AND IMAGES.
Tools> Internet Options->Security Tab	Click on TRUSTED SITES	Add the WebLink URL as a "trusted site." To do this, click the SITES button. In the ADD THIS WEBSITE TO THE ZONE: box, type the address (the URL) of the WebLink site and click the ADD button. You may need to temporarily de-select the REQUIRE SERVER VERIFICATION (https:) FOR ALL SITES IN THIS ZONE check box to enter the AddVantage URL.
File->Page Setup	Page Orientation	Landscape  Right & Left margins should be set to 0.5. Top and Bottom margins should be set to 1. Clear Header and Footer information

<p>Tools&gt; Popup Blocker</p>	<p>Popup Blocker Settings</p> <p>If the Popup Blocker Settings option is not available, select Turn On Popup Blocker first and then select Tools&gt;Popup Blocker Settings.</p>	<p>Add WebLink URL in the Trusted Site</p>
<p>If you are using Windows XP Service Pack 2 (SP2), please ensure that these following adjustments are made:</p>		<p>Change the Pop-up Blocker settings to allow all content from the WebLink site to be sent to your browser. To do this open Internet Explorer and on the Tools menu point to Pop-up Blocker and then click Pop-up Blocker Settings. In the ADDRESS OF WEBSITES TO ALLOQ box, type the address (the URL) of the WebLink site and click OK.</p>

## Accessing Your Portfolio via the First Republic Bank Web Site

Once your Internet settings have been verified, you can now access WebLink.

Visit the First Republic Bank website: [www.firstrepublic.com](http://www.firstrepublic.com)

Select **Trust Online**.

## First Time Log On Instructions

***All portfolio information is encrypted.***

To protect your personal portfolio data, **First Republic Trust Company** has implemented a level of security which requires you to go through a one time setup the first time you log on. This setup incorporates a “fingerprint” for you and the computer you are using when proceeding through the log on setup. Should you attempt to log on on a different PC, the system requires the same initial setup so your “fingerprint” can be associated with the PC you are using at the time.

When you log onto the First Republic Bank web site, the WebLink Log On screen appears.

**First Republic Trust Company** has assigned a User ID and a Password to you. This User ID and Password are required for you to access your portfolio.

The following information is provided to assist you with the WebLink login procedures.

Enter your user ID and click LOGIN.

## Log On

User ID:

## Weblink

Version: 2006A  
Copyright 1998 - 2005  
SunGard Asset Management Systems  
All Rights Reserved

Powered by  
**ASP.net**

Enter your password and click LOGIN.

### Log On

User ID:

Password:

Please enter your password to activate your account.

You must choose an image which will become part of your login process from this point forward. The purpose of this image is to thwart others attempting to persuade you into giving your password to a fake "First Republic" site. Your login to First Republic Trust Company's WebLink site will always display this image.


Select a category of images from the drop down box. Then select the image you want to display in your future logins.

## Change Your Image

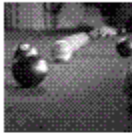
Abstract ▾

- Abstract
- Nature
- Objects
- People
- Places
- Sports
- Technology
- Transportation


Select Category




Select this Image




Select this Image




Select this Image




Select this Image




Select this Image




Select this Image




Select this Image




Select this Image



Select this Image



Select this Image




Select this Image

Select a new image either by clicking the SELECT THIS IMAGE link underneath the image or by clicking on the actual image. You should see the picture you selected before you enter your password, assuring that you are on the legitimate WebLink site.

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Enter a word or phrase associated with your welcome image in the ENTER WELCOME MESSAGE prompt and click NEXT.

Enter Welcome Message



"I am JHAMILTON "  
Username: JHAMILTON


**Enter Welcome Message**

**Next>>**

You should see the welcome message before you enter your password to ensure you are at the legitimate First Republic WebLink site.

Enter your current password and click Login.

## Log On



UserName: JHAMILTON  
Andre

Password:

**Enter your password only if you see your personal welcome message below your selected welcome image.**

If you are not JHAMILTON , [click here](#).

**Private computer**


**Public shared computer**

If you **CLICK HERE** you are logged off.

- If you click Private Computer, a “cookie” is placed on the device you are using. The next time you login, WebLink recognizes the device and does not prompt you for a challenge question.
- If you click Public shared computer, no “cookie” is placed on the device you are using and you are prompted for a challenge phrase, which you must answer correctly.

You are required to change your password the first time you log on. **First Republic Trust Company** has instituted a password format consisting of a combination of at least six alphanumeric characters.

## Change Password



UserName: JHAMILTON  
Andre

Password:

New Password:

Confirm Password:

**Enter your password only if you see your personal welcome message below your selected welcome image.**

Your password has expired. Change it to gain access to site!

If you are not JHAMILTON , [click here](#).

Private computer

Public shared computer

## Subsequent Logon Instructions

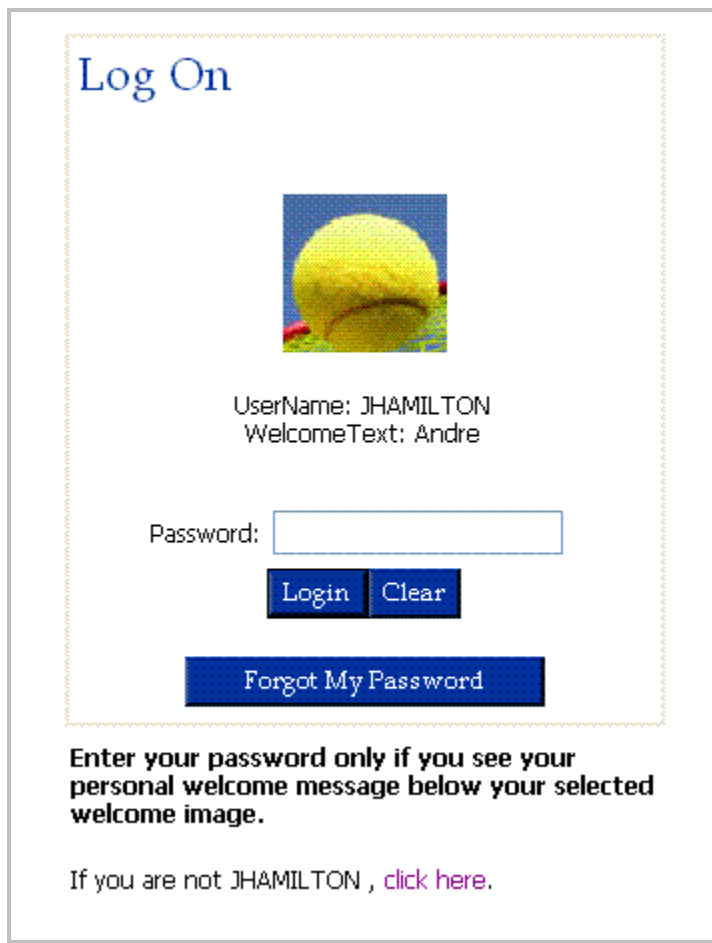
Enter your User ID. You are then presented with the welcome image you chose on your initial login.




Log On

User ID:

Enter your password. Once the system validates your information, you are logged in.



Log On



UserName: JHAMILTON  
WelcomeText: Andre

Password:

**Enter your password only if you see your personal welcome message below your selected welcome image.**

If you are not JHAMILTON , [click here](#).

## WebLink Features

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**Available features include:**

- Immediate access to your portfolio Information from any location via the Internet.
- Portfolio Information displayed on a Settled or Traded basis.
- Portfolio Information displayed on “Current” or “As-of-Date” Basis.
- Long and Short Term Gains/Losses displayed.
- User selected options for customization of data displayed on reports.
- Ticker Symbol (if selected for display) hyperlinks to an Investment Information site on the Internet.
- Portfolio information displayed graphically.
- Cash Projection information for up to 99 days.
- All reports are viewable and printable.
- Drill Down capabilities for viewing individual asset or transaction detail, including individual tax lot information for each asset.
- Download of information into a spreadsheet format, such as EXCEL.
- Download of information into a personal financial management system, such as QUICKEN or MS Money
- Capability to view a statement on your Portfolio Management/Trust Account via the Internet.

## WebLink Trust View Reports Include

1. My Accounts
  - a. Account List
  - b. Account Balance General (including Cash Management Balances)
  - c. Investment Summary with Pie Chart
    - i. Investment Detail
    - ii. Tax Lot for a Single Investment
  - d. Asset Detail
    - i. Tax Lot for a Single Investment
  - e. Tax Lot Detail
2. Transactions
  - a. Posted Transaction Activity
    - i. Posted Transaction Detail
  - b. Pending Transaction Activity
    - i. Pending Transaction Detail
3. Cash Projection Summary
4. Cash Projection Detail