



First United

Bank & Trust

Wealth Management

Wealth Services Account Access

Your First United Bank & Trust Wealth Management Team is always happy to help support your needs. Our website is designed to provide the same robust experience from a desktop or mobile phone. Giving you account information at your fingertips to help keep your priorities front and center.

Getting Started

Your Wealth Advisor or Administrator will help you initiate access to our Wealth Services online and mobile app service.

Once account set-up is complete, simply access your Wealth Services account using our website at [MyBank.com/wealth](https://mybank.com/wealth) or our mobile app.

Important! Our mobile app is provided by Invoisa, Inc. and once accessed, requires the following Registration Key: **river**

Your Wealth Services account offers a number of features and helpful tools, beginning with 3 Main Menus:

Home page

View account balances & customize dashboard pages.



The screenshot shows the First United Wealth Management dashboard. At the top left, the First United logo is visible. The main header displays 'All Accounts' with a total value of '\$1,189,666.90'. Below this, there's a 'Dashboard' section with a 'Selected Accounts' dropdown set to 'Sample Account'. A donut chart titled 'Asset Allocation by Major Type (Most Recent)' shows three categories: Equity (62%), Fixed Income (33%), and Cash Equivalents (5%). To the right of the chart is a table for 'Last 10 Transactions (Most Recent)' with columns for Date, Transaction, and Amount. Below the transactions is a 'Market Value Over Time (YTD)' table showing a change of +0.12% for the 'All Accounts'.

Date	Transaction	Amount
11/09/2023	Dividend - Ordinary	90.96
11/09/2023	Fee paid from account of \$54.69 October 2023	-54.69
11/02/2023	Dividend - Ordinary on 1,177.394 shares	78.89
11/02/2023	Dividend - Ordinary	29.69
11/02/2023	Dividend - Ordinary	14.27
11/01/2023	Dividend - Ordinary on 536.839 shares	83.00
11/01/2023	Dividend - Ordinary	18.96
11/01/2023	Dividend - Ordinary	13.63
11/01/2023	Dividend - Ordinary	19.28
10/31/2023	Dividend - Ordinary on 110 shares	58.91

Account	Change %	Change \$
All Accounts	+0.12%	+1,027.63

Account Balances
Check current values for each of your accounts along with a total value for all accounts combined.

Account Name
Select to view the specific Account Summary.

Customizable Dashboard
Easily customize dashboard pages to view all account or snapshot data in one place.

Accounts

View account reports including holdings.

Sample Account Name

Account Balance: \$1,189,666.90 | Available Cash: \$47,618.03

My Portfolio

Target Allocation (Balanced)

Actual Allocation

Asset Class	Percentage	Market Value
Cash Equivalents	4.00%	47,618
Fixed Income	41.08%	488,656
Equity	54.92%	653,392
Portfolio Total	100.00%	1,189,667

Recent Activity

Date	Transaction	Amount
11/03/2023	Dividend - Ordinary	90.96
11/03/2023	Fees paid from account of \$584.49 October 2023	-584.49
11/02/2023	Dividend - Ordinary on 1,177,396 shares	78.89
11/02/2023	Dividend - Ordinary	29.69
11/02/2023	Dividend - Ordinary	14.47
11/01/2023	Dividend - Ordinary on 336,829 shares	83.08
11/01/2023	Dividend - Ordinary	18.90
11/01/2023	Dividend - Ordinary	19.63
11/01/2023	Dividend - Ordinary	19.28
10/31/2023	Dividend - Ordinary on 110 shares	58.91
10/30/2023	Dividend - Ordinary on 1,665,709 shares	43.11
10/30/2023	Dividend - Ordinary on 4,160,657 shares	191.84
10/30/2023	Dividend - Ordinary on 1,000 shares	114.51
10/27/2023	ACH - Monthly Loan Payment	-7,339.16
10/24/2023	Sale 25,000 par value @ \$36.68	21,687.75

Portfolio Performance (YTD)

Total Account: 3.70% | Composite Index: 0.00%

Contact Us

Admin Office
19 South Second Street
Caldwell, MD 21510

The Account Summary provides a comprehensive overview, including:

- Account Balances and Allocations
- Performance Returns
- Recent Activity
- Holdings
- Contact Information

Statements

Enrollment for electronic statements will be completed during initial set-up, allowing you to view or download account statements at your convenience.

Change in Account Value

	This Period	Year To Date
Starting Value	\$1,207,829.79	\$1,188,259.27
Deposits and Withdrawals	(\$7,258.10)	(\$80,222.41)
Dividends and Interest	\$2,188.42	\$26,767.69
Revenues	\$0.00	\$0.00
Transfers	\$0.00	\$0.00
Change in Value of Investments	(\$24,648.18)	\$65,762.57
Ending Value on 09/30/2023	\$1,181,818.40	\$1,181,818.40
Total Accounts	(\$12,067.32)	(\$2,443.87)
Total Ending Value	\$1,189,167.29	\$1,189,167.29

Asset Composition

Asset Class	Market Value	% of Account
Cash Equivalents	\$48,119.23	4%
Equity	\$645,324.64	54%
Fixed Income	\$521,849.23	44%
Accounts	\$6,874.19	1%
Grand Total	\$1,189,167.29	100%

Realized Gain or (Loss) Summary

Short Term	This Period	Year To Date
	\$208.07	(\$4,807.80)
Long Term	This Period	Year To Date
	\$0.00	(\$22,891.94)





[MyBank.com/wealth](https://www.mybank.com/wealth)

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