



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

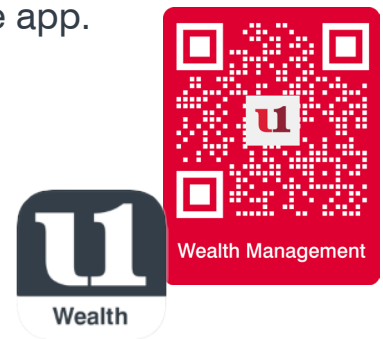
Your Wealth Advisor or Administrator will help you initiate access to our Wealth Services online and mobile app service.

Once account set-up is complete, simply access your Wealth Services account using our website at **MyBank.com/wealth** or download our mobile app.

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 displays the First United Wealth Management dashboard. At the top, it shows 'All Accounts' with a total value of \$1,189,666.90. The dashboard is divided into several sections:

- Account Balances:** Check current values for each of your accounts along with a total value for all accounts combined.
- Asset Allocation by Major Type (Most Recent):** A donut chart showing the distribution of assets into three categories: Equity (60%), Fixed Income (40%), and Cash Equivalents (0%).
- Last 10 Transactions (Most Recent):** A table listing recent transactions, including dividends and fees.
- Market Value Over Time (YTD):** A table showing the change in market value over time, with a change of +1,407.63.

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	14.27
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
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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	(87,258.10)	(860,222.41)
Dividends and Interest	\$2,186.42	\$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	\$1,118,816.40	\$1,188,816.40
Total Accounts	(\$12,067.32)	(\$2,440.87)
Total Ending Value	\$1,191,107.29	\$1,191,107.29

Asset Composition

Asset Class	Market Value	% of Account
Cash Equivalents	\$48,113.23	4%
Equity	\$645,324.64	54%
Fixed Income	\$521,849.23	44%
Accounts	\$0.00	0%
Grand Total	\$1,191,107.29	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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