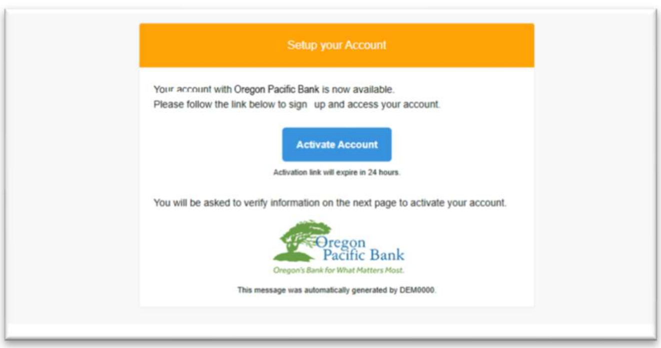
Trust Client Portal – New User Guide

Welcome

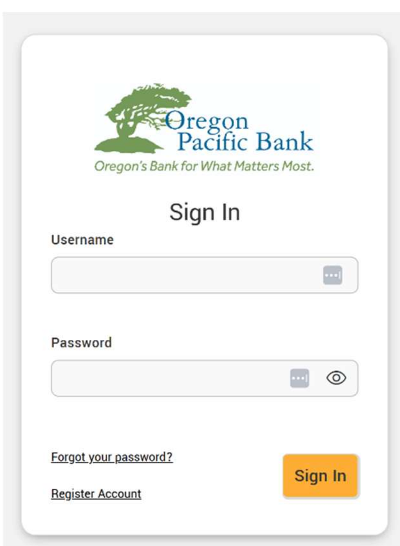
This guide will help you register, sign in, and get oriented in your Trust Client Portal. If you run into issues, your local trust team is ready to help.

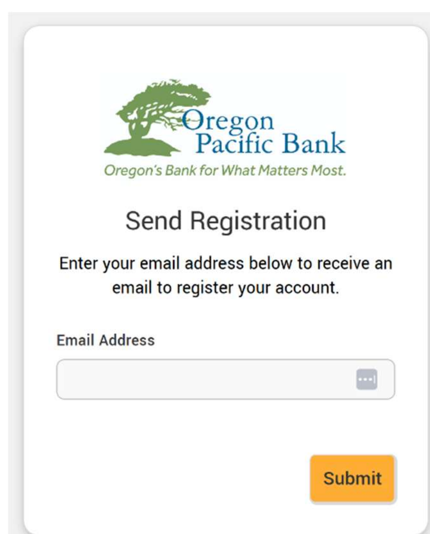
1) How to Access the Portal

- **Option A – From welcome email:** If you are already enrolled in our current portal, you will receive a welcome email at the address set up for you. Click **Activate Account** within the welcome email to begin registration.
    - *The email will come from donotreply@sso.cheetahinc.net



- **Option B- From OPB's Website:** Go to www.OregonPacificBank.com → click **Login** → choose **Trust Client Login** in the dropdown. This will take you directly to our new client portal at: http://oregonpacific.accessasc.com/
    - If you did not receive a welcome email, navigate to the Trust Client Login screen on Oregon Pacific Bank's website, then select **Register Account** in the bottom left-hand corner to start self-registration.

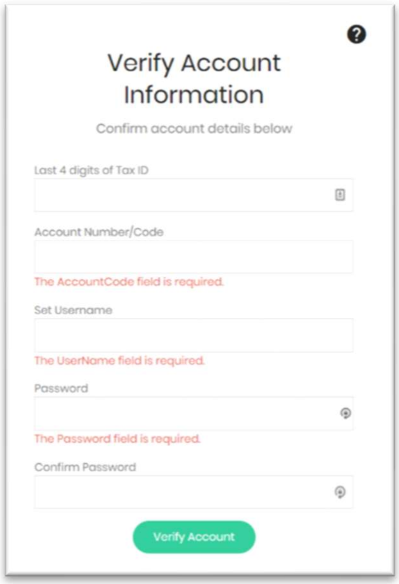




2) Confirm Your Identity & Set Credentials

On the verification page, you'll be asked for identification details and to create your sign-on credentials:

- Identification: you'll be prompted for account-specific information (e.g., **account number/code** and/or the **last four digits of your SSN/Tax ID**).
- Create your **username**.
- Create and confirm your **password**.
  After submitting, proceed to the dashboard.



- **Set up two-step verification**: Choose to receive a **security code** via **text message or email**, enter the code, and you'll be signed in. Codes are valid for **five minutes**; if the time expires or you didn't receive the code, resend and try again (or contact your trust team).

3) Signing in After Initial Registration

- **Standard sign-in**: Enter your **username** and **password** on the portal login page.
  - Go to www.OregonPacificBank.com → click **Login** → choose **Trust Client Login** in the dropdown, then continue.
- **Save time next visit**: Select **Remember Browser?** so you don't have to complete two-step verification next time on that device.
- **Account lockouts**: Five incorrect attempts will lock your account for **30 minutes**. After that, try again.

Forgot your password?

Click **Forgot Password**. You'll receive an email with a reset link that's valid for **30 minutes**. After creating your new password, **open a new browser tab** and go back to the portal link to sign in with your username and new password. If you don't see the email within 30 minutes, click **Forgot Password** again or contact your trust team.

4) What you can do in the portal

Dashboard

- See your **account totals** and **asset summary** (click through for full portfolio details).
- View **net unrealized gain/loss**.
- Read **announcements** from the bank.
- Find **contact information** and click the email address to draft a message to your trust team.

Documents (*coming in future enhancement*)

- **Upload** documents to OPB (**+ Add Document**).
- **Access** documents sent to you by OPB.
- **Search**, **sort**, and **filter** to find what you need.

Portfolio

- View **all your accounts and holdings** with OPB.
- Select one or multiple accounts from the left panel.
- Switch views: **Assets**, **Asset Types**, **Classes**, or **Industries**.
- Use **Summary** (top 10) or **Details** for deeper information.
- Click any **underlined** item to drill down further.

Transactions

- Select one or multiple accounts to see **transaction history**.
- Click underlined entries for more details.
- **Export Data** to PDF or spreadsheet.
- **Search** and **filter** transactions.
- View **Fees** on the **Fees** tab (also searchable, filterable, and exportable).

Getting Support

To contact your local trust team for support, please email us at **trustclientsupport@opbc.com** or call 541-902-7240.