

FIRST REPUBLIC TRUST COMPANY
ONLINE LOGIN GUIDE



FIRST REPUBLIC TRUST COMPANY
It's a privilege to serve you®

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WELCOME TO TRUST ONLINE

Welcome to First Republic Trust Online, the online solution to managing your financial portfolio. This guide is intended to familiarize you with our login process. This robust login procedure will ensure greater security for our Trust Online clients.

Trust Online offers a wide variety of customizable tools that can make managing your portfolio more convenient and efficient. Here are just a few of the features and functions you can access 24 hours a day, seven days a week through Trust Online:

- 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.

TRUST ONLINE LOGIN

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 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.

For current users, please skip to step 3 on page 7.

For new users please follow the steps starting on the following page.

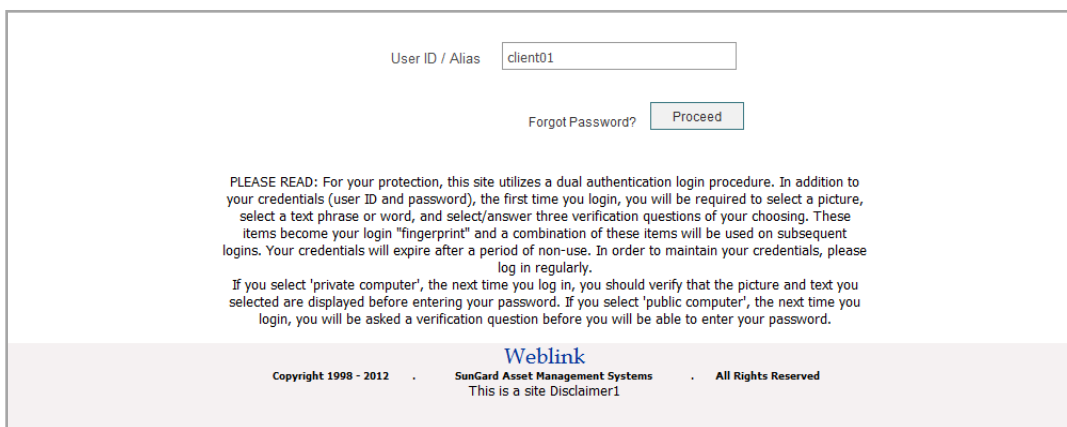
STEP 1: ENTER YOUR USER ID

When you visit the First Republic Bank website, at www.firstrepublic.com, click on the Login button in the top right corner and then select Trust Online.

The new User ID and Password you have assigned are required for you to access your portfolio.

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

Enter your User ID and click on **Proceed**.



The screenshot shows a login form with a text input field for 'User ID / Alias' containing the text 'client01'. Below the field is a 'Forgot Password?' link and a 'Proceed' button. A paragraph of text explains the dual authentication login procedure, mentioning the selection of a picture, text phrase, and verification questions. At the bottom, there is a footer with the 'Weblink' logo, copyright information (1998-2012), and a disclaimer.

User ID / Alias

[Forgot Password?](#)

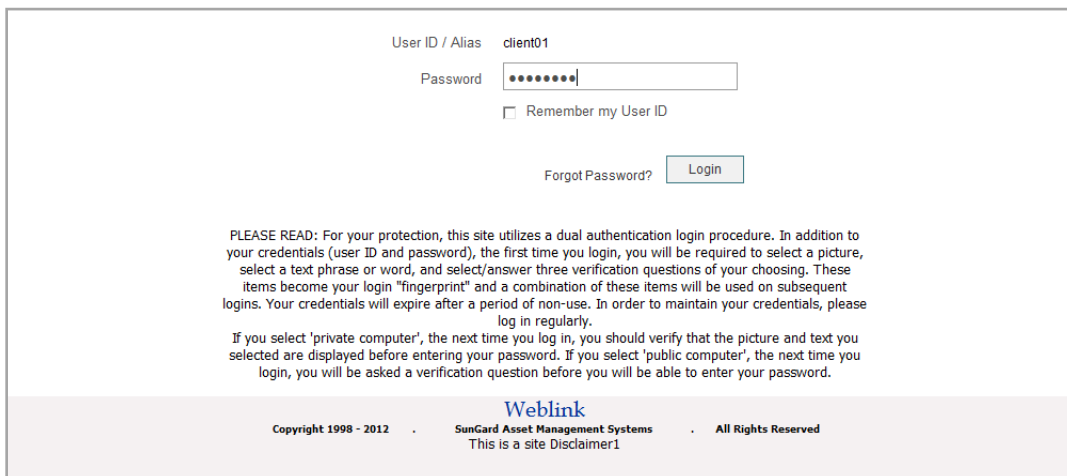
PLEASE READ: For your protection, this site utilizes a dual authentication login procedure. In addition to your credentials (user ID and password), the first time you login, you will be required to select a picture, select a text phrase or word, and select/answer three verification questions of your choosing. These items become your login "fingerprint" and a combination of these items will be used on subsequent logins. Your credentials will expire after a period of non-use. In order to maintain your credentials, please log in regularly.

If you select 'private computer', the next time you log in, you should verify that the picture and text you selected are displayed before entering your password. If you select 'public computer', the next time you login, you will be asked a verification question before you will be able to enter your password.

[Weblink](#)
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This is a site Disclaimer1

Enter your current Password. You can denote whether you want the site to remember your User ID.

Click on **Login**.



The screenshot shows the same login form as the previous one, but now the 'Password' field is visible and contains a series of dots. Below the password field is a checkbox labeled 'Remember my User ID' and a 'Login' button. The same explanatory text and footer are present.

User ID / Alias

Password

☐ Remember my User ID

[Forgot Password?](#)

PLEASE READ: For your protection, this site utilizes a dual authentication login procedure. In addition to your credentials (user ID and password), the first time you login, you will be required to select a picture, select a text phrase or word, and select/answer three verification questions of your choosing. These items become your login "fingerprint" and a combination of these items will be used on subsequent logins. Your credentials will expire after a period of non-use. In order to maintain your credentials, please log in regularly.

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This is a site Disclaimer1

STEP 2: CHANGE YOUR PASSWORD

If this is the first time you are logging onto the **Trust Online** site, you must change your password. You will be prompted to enter the password you were assigned, and then enter your new password in the New Password and Confirm New Password boxes.

Click on **Change Password**.

If you are an active user of Trust Online, you will not be required to go through the password change process.

Change Password CLIENT01
This page allows you to update your password.
The Following rules apply when you change your password:
New Password must contain at least 4 characters.
New Password must contain at least 1 different character(s) from previously used password.

Old Password:

New Password: **Strong**

Confirm New Password:

PLEASE READ: For your protection, this site utilizes a dual authentication login procedure. In addition to your credentials (user ID and password), the first time you login, you will be required to select a picture, select a text phrase or word, and select/answer three verification questions of your choosing. These items become your login "fingerprint" and a combination of these items will be used on subsequent logins. Your credentials will expire after a period of non-use. In order to maintain your credentials, please log in regularly.

If you select 'private computer', the next time you log in, you should verify that the picture and text you selected are displayed before entering your password. If you select 'public computer', the next time you login, you will be asked a verification question before you will be able to enter your password.

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STEP 3: SET YOUR IMAGE AND PERSONALIZED CAPTION

You must choose an image and provide a personalized caption. Both will become part of your login process from this point forward. The purpose of the image and caption is to thwart others attempting to persuade you into giving your password to a fake “First Republic” site.

Your login to First Republic Trust Online will always display this image and caption.

Click on an image.

Select Personalized Login Page Image

Use this page to select your preferred image (from the list of available images) along with a personalized caption. The chosen image and caption will appear on your login page, after you enter your username. This will help you identify the login page as genuine, reducing the risk of a “phishing” attack.


Your Selected Image:

Your Personalized Caption:

PLEASE READ: For your protection, this site utilizes a dual authentication login procedure. In addition to your credentials (user ID and password), the first time you login, you will be required to select a picture, select a text phrase or word, and select/answer three verification questions of your choosing. These items become your login “fingerprint” and a combination of these items will be used on subsequent logins. Your credentials will expire after a period of non-use. In order to maintain your credentials, please log in regularly.

If you select 'private computer', the next time you log in, you should verify that the picture and text you selected are displayed before entering your password. If you select 'public computer', the next time you login, you will be asked a verification question before you will be able to enter your password.

Select an image and apply a personalized caption for it.




Cancel Refresh

Enter a personalized caption and click on **Save**.

Select Personalized Login Page Image

Use this page to select your preferred image (from the list of available images) along with a personalized caption. The chosen image and caption will appear on your login page, after you enter your username. This will help you identify the login page as genuine, reducing the risk of a “phishing” attack.

Your Selected Image: 

Your Personalized Caption:

Save

PLEASE READ: For your protection, this site utilizes a dual authentication login procedure. In addition to your credentials (user ID and password), the first time you login, you will be required to select a picture, select a text phrase or word, and select/answer three verification questions of your choosing. These items become your login “fingerprint” and a combination of these items will be used on subsequent logins. Your credentials will expire after a period of non-use. In order to maintain your credentials, please log in regularly.

If you select 'private computer', the next time you log in, you should verify that the picture and text you selected are displayed before entering your password. If you select 'public computer', the next time you login, you will be asked a verification question before you will be able to enter your password.

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STEP 4: SET YOUR CHALLENGE QUESTIONS

You must set at least three Challenge Questions with valid responses.

Click on **+Add** to set each question.

The screenshot shows the 'Set Challenge Question' interface for 'TRBEWL'. At the top, it indicates 'Minimum Answers: 3 (Remaining 3)' and 'Minimum Red Herring: 1 (Remaining 1)'. A note states: 'Red Herring questions are designed to fool fraudsters into answering false questions. They will be mixed with your normal challenge questions. When you see a Red Herring question, the proper answer is to LEAVE IT BLANK.' Below this is a pagination bar showing 'Page: 25' and '0 - 0 of 0'. A table with columns 'Challenge Question', 'Challenge Answer', 'Red Herring', 'Edit', and 'Delete' is shown, with the message 'No challenge questions have been added' below it. A red circle highlights the '+Add' button in the top right corner.

You can select your questions from a list of pre-defined questions or you can add your own questions.

Click on **Save** once you have entered your answer.

The screenshot shows the 'Set Challenge Question' interface with the 'Configure Challenge or Red Herring Question' modal open. The modal has a title bar and contains the following fields: 'Select Question Type' (dropdown menu with 'Challenge with Answer' selected), 'Question Option' (radio buttons for 'Select From List' (selected) and 'Add My Own Question'), 'Challenge Question' (dropdown menu with 'What is your pet's name?' selected), and 'Challenge Answer' (text input field). There are 'Cancel' and 'Save' buttons at the bottom of the modal. The background interface is partially visible, showing the same pagination and table as the previous screenshot.

Once you have set your Challenge Questions, you will be logged into the Trust Online site.

TECHNICAL DETAILS

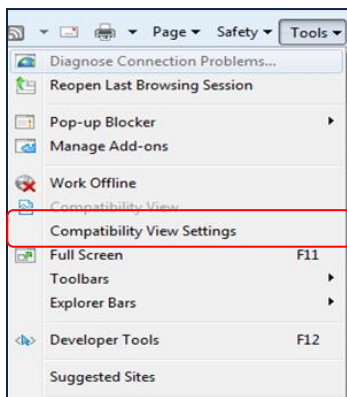
The supported browsers include Internet Explorer versions 8 and 9, Chrome, Firefox, Safari, and Opera.

Browser and Version	Operating System
Internet Explorer 9.0.8112.16421	Win 7
Internet Explorer 8.0.7600.16385	Win 7
Firefox 9.0.1	Win 7
Chrome 16.0.912.63	Win 7
Safari 5.1.2	Win 7
Opera 11.6	Win 7
Firefox 9.0.1	Mac OS X Leopard
Safari 5.1.2	Mac OS X Leopard
Opera 11.6	Mac OS X Leopard
Internet Explorer 8.0.6001.18702	Windows XP
Chrome 22.0.1229.79	Windows XP
Firefox 3.0.10	Windows XP

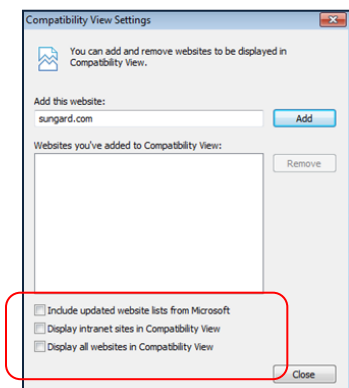
**** IMPORTANT NOTE FOR INTERNET EXPLORER USERS ****

You must check the Compatibility View Settings as below:

Click on **Tools**; then click on **Compatibility View Settings**



Be sure that all options are unchecked; then click on Close.



TECHNICAL DETAILS

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