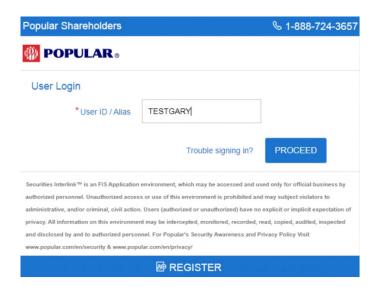# Shareholders User Guide

POPULAR®

Access and User Authorization

Each user must have their own personal User ID and password to access the site. Online Access users who have already registered, via the Initial Registration process, will be able to enter their user credentials to access the portal. If this is the first time to register, users will select 'Register'.

The first time a user logs on, they will be required to complete some extra steps specific to the initial login. These steps include selecting a non-temporary password and registering a device for receiving a One-Time PIN. Should the user cancel at any time during the Login process, user will immediately exit the portal. The next login attempt will take the user through the initial Login process again, until successfully completed.

Popular Shareholders	📞 1-888-724-3657

POPULAR®

User Login

*User ID / Alias — TESTGARY

Trouble signing in?   **PROCEED**

Securities Interlink™ is an FIS Application environment, which may be accessed and used only for official business by authorized personnel. Unauthorized access or use of this environment is prohibited and may subject violators to administrative, and/or criminal, civil action. Users (authorized or unauthorized) have no explicit or implicit expectation of privacy. All information on this environment may be intercepted, monitored, recorded, read, copied, audited, inspected and disclosed by and to authorized personnel. For Popular's Security Awareness and Privacy Policy Visit www.popular.com/en/security & www.popular.com/en/privacy/
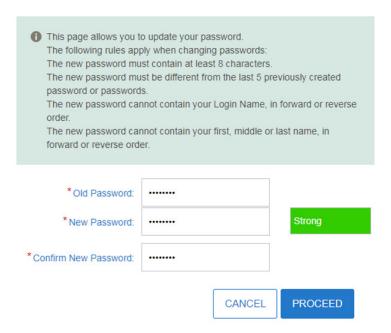
REGISTER

Initial Login

After entering the application URL, the above home page is displayed. On this page, the user should enter the User ID and click on Proceed.

Popular Shareholders	📞 1-888-724-3657

POPULAR®

User Login

User ID / Alias   TESTGARY

*Password

Trouble signing in?   CANCEL   SIGN IN

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REGISTER

User should specify the Temporary Password in the respective field. Note that User IDs **are not** case-sensitive, but passwords **are**.

The user can then either select the Sign In button or the Enter key. The page will transition to the following view where the user can select a new password:
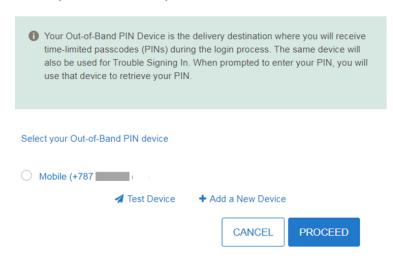
Change Password

ⓘ This page allows you to update your password.
The following rules apply when changing passwords:
The new password must contain at least 8 characters.
The new password must be different from the last 5 previously created password or passwords.
The new password cannot contain your Login Name, in forward or reverse order.
The new password cannot contain your first, middle or last name, in forward or reverse order.

* Old Password: ••••••••

* New Password: ••••••••   Strong

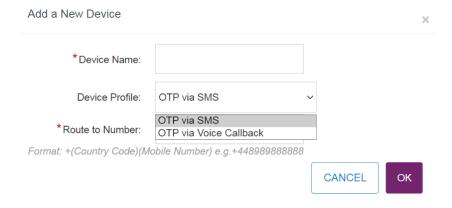* Confirm New Password: ••••••••

CANCEL   PROCEED

The widget indicates the strength of the password as user enters. It will not be accepted if weak. Password must adhere to the validations presented on the screen. Please note passwords are case-sensitive.

Once the new password is selected, user will navigate to the next screen where a method to receive the one-time PIN must be selected. As this is the first-time login, user must select 'Add a New Device' option.
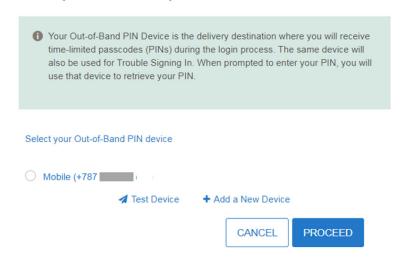
How do you want to receive your One-Time-PIN?

ⓘ Your Out-of-Band PIN Device is the delivery destination where you will receive time-limited passcodes (PINs) during the login process. The same device will also be used for Trouble Signing In. When prompted to enter your PIN, you will use that device to retrieve your PIN.

Select your Out-of-Band PIN device

○ Mobile (+787 ▓▓▓▓▓)

➤ Test Device   ＋ Add a New Device

CANCEL   PROCEED

A new pop appears for device registration.

Add a New Device   ✕

*Device Name: [   ]

Device Profile: [OTP via SMS   ▾]

                       ┌────────────────────────────┐
                       │ OTP via SMS   │
*Route to Number: │ OTP via Voice Callback   │
                       └────────────────────────────┘

Format: +(Country Code)(Mobile Number) e.g.+448989888888

                                    [CANCEL]   [OK]

The user must provide the following information for registration:

a. **Device Name:** Provide a name to the device being registered.

b. **Device Profile:** The Device Profile has two options (User can choose to have both or any one of the options. Dropdown will have values accordingly for user selection)

   •   **OTP via SMS:** If User selects this option, an SMS will be received for the PIN on the mobile number provided by the user.

   •   **OTP via Voice Callback:** If User selects this option, a voice call back will be received on the mobile number provided by the user with the PIN.

c. **Route to Number:** User must provide the mobile number on which he wants to receive either the voice call back or SMS for the PIN. The format is +(Country Code)(Mobile Number) without any hyphens or brackets as shown in the example on the screen.
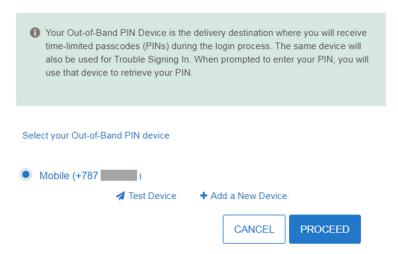
How do you want to receive your One-Time-PIN?

ⓘ Your Out-of-Band PIN Device is the delivery destination where you will receive time-limited passcodes (PINs) during the login process. The same device will also be used for Trouble Signing In. When prompted to enter your PIN, you will use that device to retrieve your PIN.

Select your Out-of-Band PIN device

◯ Mobile (+787 ▮▮▮▮▮▮)

        ✈ Test Device   ＋ Add a New Device

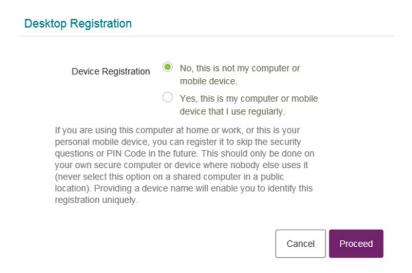   [CANCEL]   [PROCEED]

Once the device is successfully added, you are navigated back to the screen with the device now being listed on the page as shown above. User can select the device and click on Test Device to verify the SMS/voice call back is received correctly. This is an optional step.

Alternatively, user can select the device and click on proceed to next step under sign in.

How do you want to receive your One-Time-PIN?

> ⓘ Your Out-of-Band PIN Device is the delivery destination where you will receive time-limited passcodes (PINs) during the login process. The same device will also be used for Trouble Signing In. When prompted to enter your PIN, you will use that device to retrieve your PIN.

Select your Out-of-Band PIN device

🔘 Mobile (+787   )

✈ Test Device   ➕ Add a New Device

CANCEL   PROCEED

The user can select to register the desktop being used to sign into the application on this page.

Desktop Registration

Device Registration   🔘 No, this is not my computer or mobile device.

⚪ Yes, this is my computer or mobile device that I use regularly.

If you are using this computer at home or work, or this is your personal mobile device, you can register it to skip the security questions or PIN Code in the future. This should only be done on your own secure computer or device where nobody else uses it (never select this option on a shared computer in a public location). Providing a device name will enable you to identify this registration uniquely.

Cancel   Proceed

If user prefers not to enter the PIN every time to sign in, and the desktop/laptop is regularly used for accessing the application, user can select the 'Yes, this is my computer...' option. This will enable the user to sign in with only Username/Password credentials for each subsequent sign in. However, if it is not a regular device and/or is a shared computer, it is strictly advised to select the 'No, this is not my computer...' option.

User would be then required to specify the PIN received on user's registered mobile number either by SMS or voice call back (as selected in the device profile) along with username and password for subsequent login. However, user can choose to register another desktop at a later time as well as when accessing the application for signing in from a secure device.

Desktop Registration

Device Registration	○ No, this is not my computer or mobile device.
	● Yes, this is my computer or mobile device that I use regularly.
Device Name	Enter nickname ❓

If you are using this computer at home or work, or this is your personal mobile device, you can register it to skip the security questions or PIN Code in the future. This should only be done on your own secure computer or device where nobody else uses it (never select this option on a shared computer in a public location). Providing a device name will enable you to identify this registration uniquely.

Cancel   Proceed
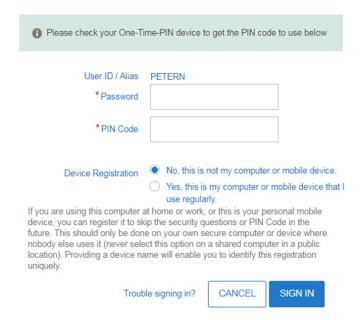
If user selects to register his/her desktop, user can provide a nickname for the device in order to recognize it easily. Once user makes the appropriate selection and clicks on Proceed, the first-time login process is complete and user will be able to see the Account Summary page for his/her account.
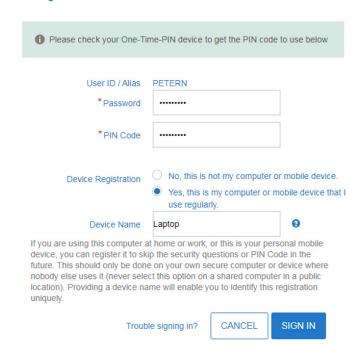
Subsequent Logins

If the user did not register a desktop during initial login, he/she must specify the PIN along with the password in subsequent logins. The PIN would be received either as SMS or via a voice call back, depending on the device profile selected during the initial login process.
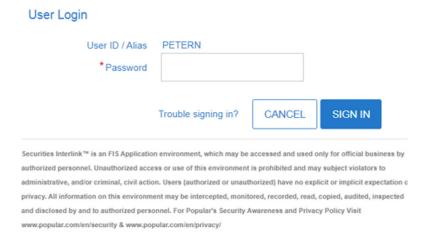
User Login

ℹ Please check your One-Time-PIN device to get the PIN code to use below

User ID / Alias	PETERN
*Password	
*PIN Code	

Device Registration
- ● No, this is not my computer or mobile device.
- ○ Yes, this is my computer or mobile device that I use regularly.

If you are using this computer at home or work, or this is your personal mobile device, you can register it to skip the security questions or PIN Code in the future. This should only be done on your own secure computer or device where nobody else uses it (never select this option on a shared computer in a public location). Providing a device name will enable you to identify this registration uniquely.

Trouble signing in?   CANCEL   SIGN IN

The user can choose to register the desktop in any of the subsequent logins to avoid using PIN in future logins. However, it is advised not to use this option when using a shared computer or a device that is not used often.

User Login

ℹ Please check your One-Time-PIN device to get the PIN code to use below

User ID / Alias	PETERN
*Password	•••••••••
*PIN Code	•••••••••

Device Registration
- ○ No, this is not my computer or mobile device.
- ● Yes, this is my computer or mobile device that I use regularly.

Device Name   Laptop   ❓

If you are using this computer at home or work, or this is your personal mobile device, you can register it to skip the security questions or PIN Code in the future. This should only be done on your own secure computer or device where nobody else uses it (never select this option on a shared computer in a public location). Providing a device name will enable you to identify this registration uniquely.

Trouble signing in?   CANCEL   SIGN IN

If the user registers his/her desktop and uses the same device for subsequent logins, user would only be required to provide his/her username and password to sign in.

User Login

User ID / Alias	PETERN
*Password	

Trouble signing in?   CANCEL   SIGN IN

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Trouble Signing In

If the password or User ID is forgotten, user may click on the 'Trouble signing in?' hyperlink on the User Login page.

Popular Shareholders   ☏ 1-888-724-3657

POPULAR.
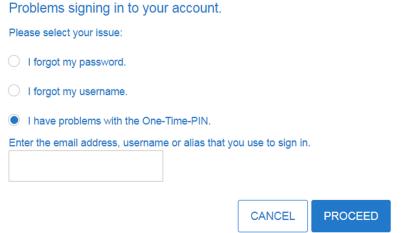
User Login

*User ID / Alias	

Trouble signing in?   PROCEED

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⊞ REGISTER

As it navigates to the page below, user will be able to select the relevant option with respect to the problem being faced.

Problems signing in to your account.

Please select your issue:

○ I forgot my password.

○ I forgot my username.

○ I have problems with the One-Time-PIN.

CANCEL   PROCEED

If the password is forgotten, user can select the 'I forgot my password' option. User will then be asked to specify either his/her email address or Username as shown below. Upon successful authentication, a message will be sent to the registered email address with a new temporary password.

Problems signing in to your account.

Please select your issue:

◉ I forgot my password.

○ I forgot my username.

○ I have problems with the One-Time-PIN.

To reset your password, enter your email address, username or alias.

[   ]

CANCEL   PROCEED

If the user does not remember his/her Username, he/she can select the 'I forgot my username' option. User will then be asked to provide his/her registered email address as shown below. Upon successful authentication, a message will be sent to the registered email address with the User ID.
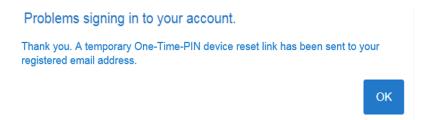
Problems signing in to your account.

Please select your issue:

○ I forgot my password.

● I forgot my username.

○ I have problems with the One-Time-PIN.

To recover your username, please provide your registered email address.

[   ]

[CANCEL] [PROCEED]

If the user does not remember the mobile number registered as One-time PIN, he/she can select the 'I have problems with the One-Time-PIN' option. User will then be asked to provide his/her registered email address or username as shown below.

Problems signing in to your account.

Please select your issue:

○ I forgot my password.

○ I forgot my username.

● I have problems with the One-Time-PIN.

Enter the email address, username or alias that you use to sign in.

[   ]

[CANCEL] [PROCEED]

Upon successful authentication, a new pop up will be displayed as shown below.

Problems signing in to your account.

Select your problem:

⦿ I don't know my One-Time-PIN device.

◯ I want to reset my One-Time-PIN device.

Password

```
|
```

| CANCEL | PROCEED |

If user does not remember the mobile number registered as one-time PIN, he/she must select the 'I don't know my One-Time-PIN device' option, provide the password and click on Proceed.

Problems signing in to your account.

Thank you. An email informing you of your One-Time-PIN device has been sent to your registered email address.

OK

User will receive a message with the information regarding the mobile number registered as One Time PIN at his/her registered email address.

Problems signing in to your account.

Select your problem:

◯ I don't know my One-Time-PIN device.

⦿ I want to reset my One-Time-PIN device.

Password

```
|
```

| CANCEL | PROCEED |
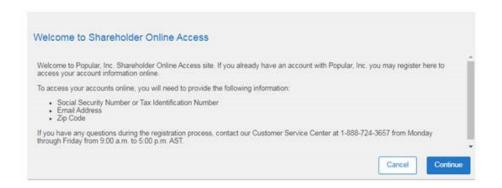
Should user wish to register a new mobile number or reset the number already registered as One-Time PIN, he/she must select the 'I want to reset my One-Time-PIN device.' option, provide the password and click on Proceed.

Problems signing in to your account.

Thank you. A temporary One-Time-PIN device reset link has been sent to your registered email address.

OK

The user will receive a reset link at his/her registered email address. Clicking on the link will require the user to repeat the same steps for the One-Time-PIN device registration as indicated earlier in this section.

First Time User Registration

The first time user registers for online access, user must select 'Register' on the homepage. User will be directed to the initial page of the Registration process. The text displayed on the page lists the steps required to complete the registration quickly as well as any other information that user may need. The text is provided by client. User must click on the Continue button to proceed with the registration. User can select the Cancel button to exit the registration process.

Welcome to Shareholder Online Access

Welcome to Popular, Inc. Shareholder Online Access site. If you already have an account with Popular, Inc. you may register here to access your account information online.

To access your accounts online, you will need to provide the following information:

- Social Security Number or Tax Identification Number
- Email Address
- Zip Code

If you have any questions during the registration process, contact our Customer Service Center at 1-888-724-3657 from Monday through Friday from 9:00 a.m. to 5:00 p.m. AST.

Cancel   Continue

Account/Login Information

User must provide all the personal information details exactly matching those saved in the company records; otherwise, registration will not be allowed.

Users must select one of the two registration types:

- **Registration for US holders:** This is the default selection, but user can change based on his citizenship. User must select this option if he is a US citizen and has certification of Taxpayer Identification Number. Tax ID number is mandatory information for this type of registration.

- **Registration for Non-US holders/Holders without proper Tax ID:** Users who are either NOT US Citizens OR who do not have proper Tax ID certification should use this registration type. Tax ID is not required for this type of registration.

The system validates if account has already been registered earlier or if the account is present as linked account to any other registered account, in which case, appropriate error message is displayed, and the registration process is aborted. If the account number and the name information provided matches the information kept by the company, the registration process will be successful, and user will be sent an email with the necessary user credentials to login. If the registration fails for any reason, failed attempts will be tracked per each Tax ID and if they exceed the number of failed attempts allowed by Popular, online registration would not be allowed and the user must get in touch with Popular's customer service team to get their registration process reset.

Terms and Conditions ✎   ② Account/Login Information

○ Registration for US Holders   ⦿ Registration for Non US Holders/Holders Without Proper Tax ID

User ID * _____ ?   Email Address * _____ ?

Account Number * _____ ?   Verify Email _____ ?

First Name * _____ ?

Last Name * _____ ?

Statements Delivery Selection * ?
○ Electronic Delivery ?
○ Postal Delivery ?

[Previous] [Cancel] [Submit]

Field Descriptions

Field	Description
User ID	User must specify User ID to be used for future sign ins. User can provide anything which is easy to remember while meeting the security criteria. User IDs are NOT case sensitive. User can use letters or numbers or a combination of both. However, special characters are not allowed in User ID. Once a user ID is assigned to an account, it CANNOT be changed in the future.
Account Number	User must specify the Shareholder Account Number provided by the Company.
First Name	User must provide his/her First Name. First Name provided here must exactly match the First name registered in the company records. For example, if Company Account's Primary Registration reads as Andrew D Hudson OR Andrew David Hudson, user must indicate First Name here as Andrew. Required field for both registration types.

| Field	Description
Last Name	User must provide his/her Last Name. Last Name provided here must exactly match the Last name registered in the company records. For example, if Company Account's Primary Registration reads as Andrew D Hudson OR Andrew David Hudson, user must specify Last Name here as Hudson. Required field for both registration types.
Email Address	Provide the primary email address to be used for registration. All change requests submitted on the portal as well as all login related information will be intimated to this email ID. After successful registration, this email ID will overwrite any existing email ID already saved with the Shareholder application. Required field for both registration types.
Verify Email	Re-confirm the email address provided. Required field for both registration types.
Tax ID Number	Must provide the individual's Taxpayer ID Number. Required field for US Holders registration type.
Statements Delivery Selection	User must select preferred delivery option for all mailable statements. Postal Delivery selection would mean all mailable statements from the company will be delivered by post. Electronic delivery selection would mean all mailable statements from company would be delivered to the email address registered in the company.
Previous (button)	If selected, the user will be redirected to previous page.
Cancel (button)	If selected, message "Are you sure you want to cancel? All the information you have entered will be deleted" will be displayed. A user who responds "Yes" will be redirected to the home page. Otherwise, user will remain on the current page.
Submit (button)	If selected, the user request is submitted and if the account information matches with the information registered with the company, user will receive email notifications with User ID and temporary password information in separate emails. User would then have to go through the process steps listed in the Initial Login section in order to login into his/her account.
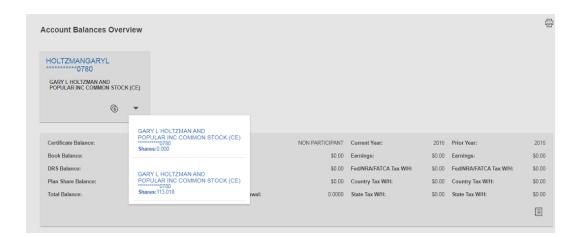
Account Cards

Throughout the site there are pages that allow the user to select a different account card if the user has multiple accounts for the signed in registration.

The presence of this ▼ icon on the right-side corner of the name card indicates the dropdown for selection. User can select any other linked account by clicking the ▼ icon and selecting the desired account from the dropdown.

General Purpose Functions
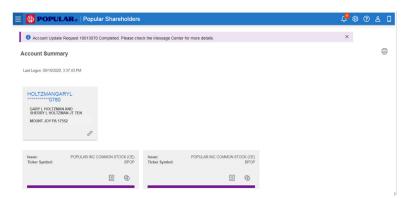
E-mail Confirmations/Notifications

A static text email confirmation is sent to shareholders for online changes. The following is a list of processes that generate email notifications:

- Address/Contact Information change
- Direct Deposit Registration/modification
- Direct Draft Registration/modification
- Plan Enrollment/modification
- Password change
- E-mail address change
- Activity Statements creation
- Recovery function - User ID/Password/PIN

Message Center

Apart from the email notifications, the user will also receive an alert notification (if still logged into the system) which shows the status of the request without having to move away from the application. The notification will remain active for a few seconds with an ability to close the alert before it disappears automatically. These alerts are generated for all the processes that generate an email notification.
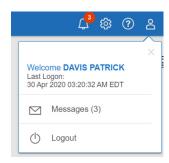
The Bell icon 🔔 shows the badge highlighted with the number of unread notifications to the user. Clicking on this icon navigates the user to the Message Centre page which shows a history of the requests submitted by the user and their corresponding status. The page basically lists out the same email notifications that are sent out to the user along with its status. Clicking on any notification message marks it as read and is removed from the badge's unread notifications count.
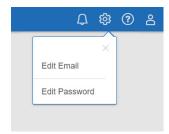
Field Descriptions

Field	Description
Date	Calendar date on which the request was submitted.
Request Type	Type of request initiated by the user.
Request Status	Status of the request.
Title	This is the same title with which email notification is sent to the user.
Message Text	This is the same text with which email is sent to the user.

Message Center can also be accessed through Account icon and clicking on the Messages sub-menu. Messages sub-menu also highlights the number of unread notifications in the braces as shown in the sample below.

Settings

If user wants to change his/her email address or password associated with his/her account login, user can do so using the options available under the Settings ⚙ icon.

Edit Email

Edit Email page can be accessed by selecting Edit Email under the Settings icon. Current email address associated with user's account login is displayed. User can provide a new email address and submit the request. This will update the email associated with shareholder's online portal access login. Once the change request is successful, an email notification is sent to both old and new email IDs with the request details. Once the request is successful, any password recovery, unauthorized login attempts and any information regarding user login will be sent to the new email address.

However, if shareholder wants to change the email address registered within the shareholder application he/she should use the Edit Contact Information page instead. A link is provided to do so on the page. Please refer to the Edit Contact Information section for additional information.

Edit Email ID
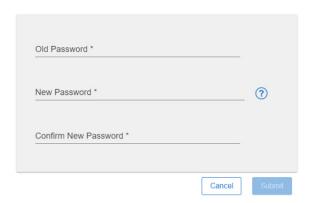
Current Email
parag.sumant@fisglobal.com

New Email *

Confirm Email *

Note: If the modification request is successful, your email ID associated with your login will be changed. If you wish to change the email ID associated with your account which is stored in our database, please click on this link

Cancel   Submit

Edit Password
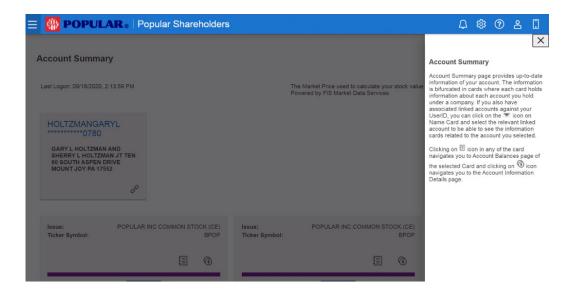
The Edit Password page can be accessed by selecting Edit Password under the Settings icon. User must provide the old password and the new password which matches the security requirements set by Popular . Once the request has been successfully submitted, user will receive an email confirmation and he/she must use the new password henceforth to login to the Online portal.

Edit Password

Old Password *

New Password *   ⑦

Confirm New Password *

Cancel   Submit

Help

The Help icon is available on all pages throughout the portal and whenever user clicks on this icon, the help content specific to the page the user is active on is displayed. User can close the window once he/she goes through the information provided.

Account Information

Account Summary

Once the user successfully logs in to Shareholder Online Access, the Account Summary page is displayed.

The page displays:

• Last log in (DD/MM/CCYY HH:MM: SS format)
• Print icon

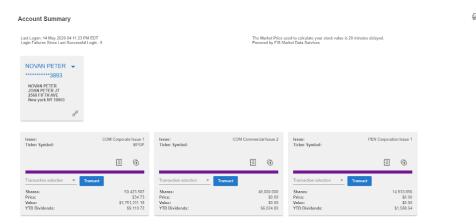The Name Card displays the Name, Account Number, Primary Registration and Address registered on the company. The system supports processing multiple accounts with the same user ID. But the shareholder must enable this feature by linking the accounts. Clicking on 🔗 icon directs the user to the Link Accounts page where the shareholder can link any of his/her associated accounts. When a user ID is entered and references more than one account in a company, a selection list is presented that displays the registration for each account. Any of the accounts can be selected for viewing by clicking ▼ in the Name Card.

The page displays the account cards associated with the selected shareholder registration. There can be one or more account cards displayed, depending on the accounts in the shareholder registration.

For example, user MATHEW A HAYDEN has two accounts under two different issues under a company. When he registers for Online access, he will be able to see two different account cards for his registration, one for each Issue he holds account under that company. Now his wife LINDA A HAYDEN also has two different accounts under the same company. And he links both the accounts using the Link Accounts feature. So now when he logs in, he will by default see the two account cards for his registration as earlier. But he can also select his wife's registration from the Name Card dropdown, in which case the page refreshes with the account cards related to his wife's registration.

Each account card will display the Issue name, Ticker Symbol, Shares Outstanding for the account, most recent price, dollar value based on the most recent price, and YTD Dividends for the account.

Selecting the dollar icon ⓢ within the cards listed will open the corresponding Account Information Detail page. Selecting the book icon 📃 within the cards listed will open the corresponding Account Balances Overview page.

Account Summary

Last Logon: 14 May 2020 04:11:23 PM EDT
Login Failures Since Last Successful Login : 0

The Market Price used to calculate your stock value is 20 minutes delayed.
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NOVAN PETER ▼
***********3893

NOVAN PETER
JOHN PETER JT
2560 FIFTH AVE
New york NY 10003

Issue:	COM Corporate Issue 1	Issue:	COM Commercial Issue 2	Issue:	PEN Corporation Issue 1
Ticker Symbol:	BPOP	Ticker Symbol:		Ticker Symbol:	

Transaction selection ▼	Transact	Transaction selection ▼	Transact	Transaction selection ▼	Transact
Shares:	50,423,587	Shares:	40,000,000	Shares:	14,933,856
Price:	$34.73	Price:	$0.00	Price:	$0.00
Value:	$1,751,211.18	Value:	$0.00	Value:	$0.00
YTD Dividends:	$9,110.72	YTD Dividends:	$6,024.80	YTD Dividends:	$1,586.64

Field Descriptions

Field	Description
Name Key Registration	Name Card associated with logged-in shareholder.
🔗	Issue Name in which shareholder has an account.
Issue Name	Issue Name in which shareholder has an account.
Ticker Symbol	Ticker Symbol for the Issue/Company.
Shares	The sum of all shares held in the account.
Price	Latest Market Price for the Shares in the Issue.
Value	The dollar value of the shares in the account based on the latest market price.
YTD Dividends	Year-to-Date dividends earned by the shareholder for the shares in the account.
📋	Opens the Account Balance Overview page.
💲	Opens the Account Information Detail page.

Account Balances Overview

Once the user has selected ▤ under any of the account cards in the Account Summary page, the corresponding Account Balances Overview page is displayed. User can also select the page from the menu.

The Page displays the Account Card with an ability to select any other account for the selected holder by clicking ▼ in the Card. The page immediately gets refreshed with the data about the selected account. If user wants to select any other linked registration account, he/she must select the relevant registration from the Name Card on the Account Summary page and then select the desired account for that registration.
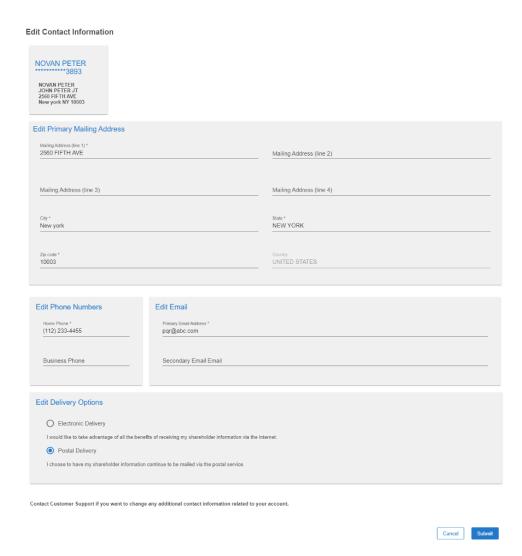
Account Balances Overview

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NOVAN PETER
COM Corporate Issue 1

Certificate Balance:	0.0000	Reinvestment Plan Status:	PARTIAL PERCENTAGE OF SHARES	Current Year Earnings:	$9,110.72	Prior Year Earnings:	$117,226.63
Book Balance:	23,000.0000	Cash Invested - Current Period:	$0.00	Current Fed/ NRA/FATCA Tax Div W/H:	$0.00	Prior Fed/ NRA/FATCA Tax Div W/H:	$0.00
DRS Balance:	0.0000	Cash Invested - Year To Date:	$35,000.00	Current Year Country Tax W/H:	$0.00	Prior Year Country Tax W/H:	$0.00
Plan Share Balance:	28,465.9850	Cash Pending Investment:	$0.00	Current Year State Tax W/H:	$699.18	Prior Year State Tax W/H:	$6,904.10
Total Balance:	51,465.9850	Shares Pending Sale Or Withdrawal:	0.0000				

Historical Activity ⌃

Select Transaction
All Transactions

Date Range   From Date   To Date
Last Quarter   01/01/2020   03/31/2020   🔍
                   MM/DD/YYYY   MM/DD/YYYY

Date	Transaction Type	Amount	Shares	Share Balance
⟩ 03/02/2020	SHARES PURCHASED	$3,603.04	248.779	50,596.587
⟩ 01/01/2020	SHARES PURCHASED	$1,327.49	70.360	50,347.808

2 total

Cost Basis ⌄

The page includes information about Securities Balances, Cash Status as well as Current and Prior Year's earnings details.

Field Descriptions

Field	Description
Account Registration	Account Information Card for the selected account.
⑨	Opens the Account Information Detail page.

Field	Description
Certificate Balance	Shares held in Certificate form.
Book Balance	Shares held in Book form.
DRS Balance	Shares held under Direct Registration.
Plan Share Balance	Shares held in Dividend Reinvestment Plan.
Total Balance	Total Shares Balance of the account which is the sum of all the shares breakdown listed above.
Reinvestment Plan Status	Current Reinvestment Status in the Dividend Reinvestment Plan.
Cash Invested - Current Period	The amount of the cash invested into a Dividend Reinvestment Plan for the current period based on plan settings.
Cash Invested - Year To Date	The amount of the cash invested into a Dividend Reinvestment Plan for the current year based on plan settings.
Cash Pending Investment	The amount of cash which is posted but yet to be reinvested into a Dividend Reinvestment Plan.
Shares Pending Sale or Withdrawal	Shares that are pending for Sale or Withdrawal.
Current Year Earnings	Earnings for the current year.
Current Fed/NRA/ FATCA Tax Div W/H	Tax W/H for the current year.
Current Year Country Tax W/H	Country Tax W/H for the current year.
Current Year State Tax W/H	State Tax W/H for the current year.
Prior Year Earnings	State Tax W/H for the current year.
Prior Fed/NRA/ FATCA Tax Div W/H	Tax W/H for the prior year.
Prior Year Country Tax W/H	Country Tax W/H for the prior year.
Prior Year State Tax W/H	State Tax W/H for the prior year.
🗏 **on balances card**	Opens the Dividend Payment Details page.

Edit Contact Information

The user can initiate the change from Account Information Detail page – Contact Information Panel's edit icon ✎ .

Edit Contact Information

NOVAN PETER
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NOVAN PETER
JOHN PETER JT
2560 FIFTH AVE
New york NY 10003

Edit Primary Mailing Address

Mailing Address (line 1) *	Mailing Address (line 2)
2560 FIFTH AVE	

Mailing Address (line 3)	Mailing Address (line 4)

City *	State *
New york	NEW YORK

Zip code *	Country
10003	UNITED STATES

Edit Phone Numbers

Home Phone *
(112) 233-4455

Business Phone

Edit Email

Primary Email Address *
pqr@abc.com

Secondary Email Email

Edit Delivery Options

○ Electronic Delivery

I would like to take advantage of all the benefits of receiving my shareholder information via the internet.

◉ Postal Delivery

I choose to have my shareholder information continue to be mailed via the postal service.

Contact Customer Support if you want to change any additional contact information related to your account.

Cancel   Submit

Field Descriptions

Field	Description
Account Registration	Account Name from the previous page. Displays the Primary Registration as well as Primary Address lines currently saved within the shareholder application.
Mailing Address Line 1	Mailing Address Line 1
Mailing Address Line 2	Mailing Address Line 2

Field	Description
Mailing Address Line 3	Mailing Address Line 3
Mailing Address Line 4	Mailing Address Line 4
City	City
State	State
Zip Code	Zip Code
Country	Address Change via online portal is allowed only within the same country, hence this field is always disabled.

Edit Phone Numbers

The user can select the Name registration to edit and update the phone numbers that apply to all accounts for that registration.

Field Descriptions

Field	Description
Home	The Home phone number field displays the account's home phone number available within the shareholder application.

User can add or change the phone number.

If provided, phone number must be in US format; 10 digits are required. The "Submit" button is not enabled until all 10 digits are provided.

User does not have to add the hyphens; system automatically formats into US phone format. Format example: (610) 555-1234. |
| **Home** | The Business phone number field displays the account's business phone number available within the shareholder application.

User can add, change or delete the phone number.

If provided, phone number must be in US format; 10 digits are required. The "Submit" button is not enabled until all 10 digits are provided.

User does not have to input the hyphens; system automatically formats into US phone format. Format example: (610) 555-1234. |

Edit Email

The user can select the name registration to edit and update the email IDs that apply to all accounts for that registration.

Field	Description
Primary Email Address	The Primary Email Address field displays the account's primary email address available within the shareholder application. User can add or change the email ID.
Secondary Email Address	The Secondary Email Address field displays the account's secondary email address available within the shareholder application. User can add, change or delete the email ID.

Edit Delivery Options

The user can select the name registration to edit and update the delivery preference that applies to all accounts for that registration.

| Field	Description
Electronic Delivery	All mailable content will be delivered through email.
Postal Delivery	All mailable content will be delivered via postal service.
Cancel (Button)	If selected, message "Are you sure you want to cancel? All the information you have entered will be deleted" will be displayed. If user responds "Yes", user will be redirected to the Account Information Detail page. If user responds "No", user will remain on the Edit Contact Information page.
Cancel (Button)	If selected, the user request will be submitted. User will receive an email notification with the request details and a notification will also be dropped in the Message center. Refer to the Email Confirmations section for more details.

Link Accounts
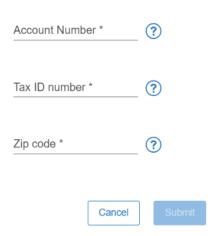
Shareholder can click on 🔗 icon on Name Card in the Account Summary page or select the Link Accounts option from the menu to navigate to the Link Accounts page.

The system supports processing multiple accounts with the same user ID. But the shareholder must enable this feature by linking accounts. After signing in, the shareholder can access only the account they signed in with. If user has other accounts, he/she can link them with the linking function. To link an account the requirements are configurable as for self-registration.

The shareholder account to which the selected accounts will be linked is displayed in the Name Card.

Link Accounts

GHI1873203381
***********3325

MARY SMITH JT
BILL SMITH
123 TEST ST
HARRISBURG PA 17105

Account Number *   (?)

Tax ID number *   (?)

Zip code *   (?)

Cancel   Submit

Field	Description
Account Number	Account Number of the account that needs to be linked.
Tax ID Number	Tax ID number of the account that needs to be linked.
Company	User must select the company associated with account to be linked.
Zip Code	User must select the Residence Zip Code associated with account to be linked.
Country	User must select the Residence country associated with account to be linked.
Cancel (button)	If selected, the message "Are you sure you want to cancel? All the information you have entered will be deleted" will be displayed. If user responds "Yes", user will be redirected to the Account Summary page. If user responds "No", user will remain on the Link Accounts Page.
Submit (button)	If selected, the user request will be submitted.