



SEI Trust Company

CIT Dashboard

User Guide

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Executive Summary

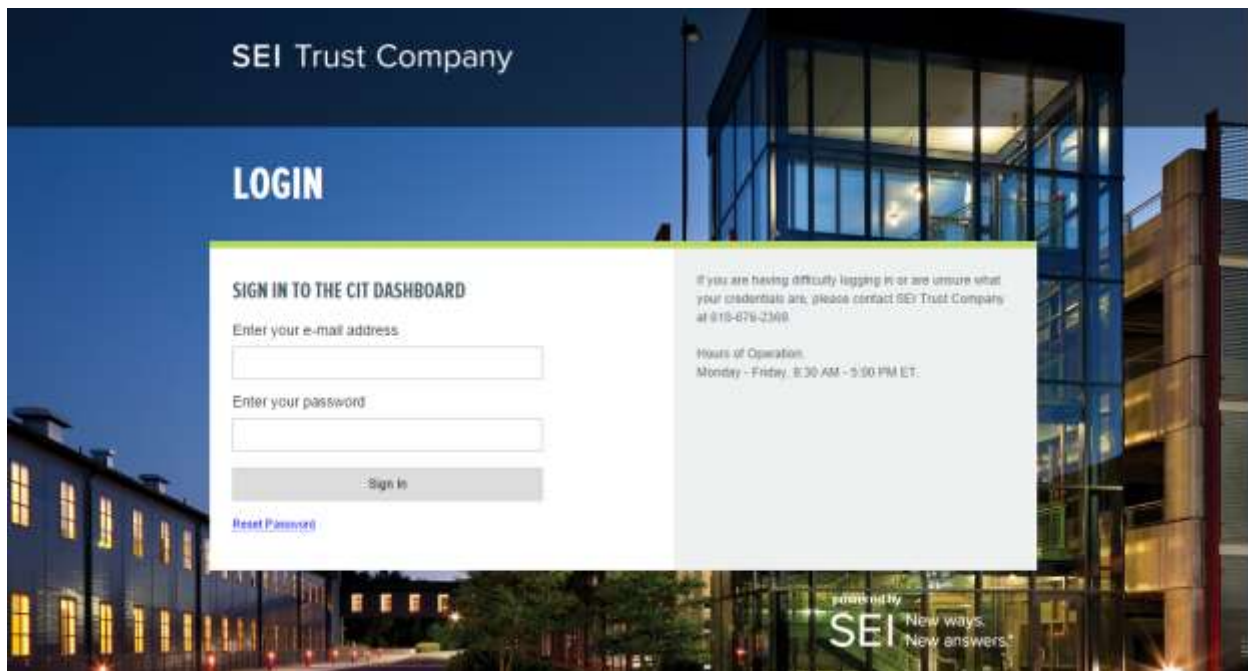
The CIT Dashboard provides access to trust, fund and account level documents via a secure website.

Optimal Internet Browsers: Google Chrome & Mozilla Firefox

Optimal Screen Resolutions: 1280 x 800 and above

I. Login – New User

- Each User will receive a New User Welcome E-mail.
- Click on the URL link in the e-mail (www.seitrustcompany.com).
- Input your email address and temporary password from the New User Welcome E-mail.



- Read and accept the Terms of Use and Privacy Statement.

The screenshot shows the SEI Trust Company website's Terms of Use page. The page has a dark blue header with the company name and navigation links. The main content area is white with a blue border. The title 'TERMS OF USE' is prominently displayed. The text includes a disclaimer, a request to read terms carefully, a statement of agreement, a section on authorization, a section on termination of access, a section on email communications, and a section on governing law. At the bottom, there is a 'I Agree' button and a footer with the SEI logo and tagline.

SEI Trust Company
Check A Trust - My Dashboard - Document Center

TERMS OF USE

TERMS OF USE

SEI TRUST COMPANY WEBSITE (WTC WEBSITE)
Terms and Conditions of Use

PLEASE READ THESE TERMS AND CONDITIONS OF USE CAREFULLY BEFORE USING THIS WEBSITE.

SEI Trust Company provides information, content and data on the WTC Website for your internal business purposes. By using the WTC Website, you agree you accept to follow and be bound by these terms and conditions of use, which govern your use of the WTC Website. If you do not agree to these terms and conditions of use, please do not use the site. SEI reserves the right, in our sole discretion, to change, modify, add or remove portions of these terms and conditions of use at any time and without prior notice, such changes, modifications, additions or deletions to be effective at midnight upon posting. Please check these terms and conditions of use periodically for changes.

The WTC Website is a web-based, internet site maintained by SEI Trust Company, and all of its subsidiaries and affiliates, including without limitation, SEI Investment Company, SEI Global Services, Inc. and SEI Private Trust Company collectively "SEI". SEI reserves the right to discontinue, suspend or restrict use and availability of the WTC Website at any time and at any time, and without any notice or liability to you. SEI further reserves the right to monitor use of the WTC Website without further approval from you.

Authorization

By submitting a request for access, you represent and warrant that the information contained in the application for access is real and will remain true and accurate in all respects. Additionally, if you are an employee, officer or director of any entity, you represent and warrant that you have been authorized by all appropriate parties, both internal and external, to have access to the materials contained on the website. You further acknowledge that, in the event that your authorization to access the materials is terminated, you shall notify SEI of such termination and SEI shall terminate your authorization to access the WTC Website immediately.

Termination of Access

SEI reserves the right to terminate your access to the WTC Website for any reason and in our sole discretion, including without limitation, for overuse or abuse of the WTC Website.

Email Communications

Email is a communication channel used by our WTC Website users. We will use your e-mail address and the content of any e-mail for correspondence purposes and to send our legal and regulatory requirements regarding customer communications. Internet and e-mail communications are not confidential and are not secure. E-mail communications will not be accepted for certain instructions, such as orders to purchase or sell a security or transfer funds. On occasion, we may use your e-mail address to send you communications with information about service and product information that we believe may be of interest to you. If you do not want to receive such unsolicited communications from us, simply send us a message to this effect.

Governing Law

These terms and conditions of use, and all other agreements you may enter into with SEI, shall, except as otherwise agreed, be governed by the laws of the Commonwealth of Pennsylvania, without regard to its choice of law provisions. By agreeing to these terms and conditions of use, you hereby consent to the exclusive jurisdiction of the courts (state and federal) located within the Commonwealth of Pennsylvania.

Click "I Agree" to agree to accept the Terms of Use.

I Agree

Investment Company
SEI New ways.
New answers.®

- Follow directions to change your password (temporary password expires on first login).
 - New passwords should include at least 8 characters, including 1 number, and should use a mixture of uppercase and lowercase letters, numbers and symbols.

SEI Trust Company

Change & Trust - My Dashboard - Document Center

CHANGE PASSWORD

NOTICE:
Your password has expired or will soon expire which requires that you change your password. To continue please complete the form below.

Current Password
[password field]

New Password
[password field]

Confirm New Password
[password field]

Submit

Password strength
Strong

- ✓ Include at least 8 characters
- ✓ Include at least 1 number
- ✓ Use a mix of uppercase and lowercase letters, numbers and symbols
- ✓ Don't use common passwords or repeated characters

powered by SEI New ways.

SEI Trust Company

Change & Trust - My Dashboard - Document Center

CHANGE PASSWORD

YOUR PASSWORD HAS BEEN CHANGED

[Continue](#)

powered by SEI New ways. New answers.®

- Each User is required to fill out security questions and answers.

SEI Trust Company

Choose a Trust - My Dashboard - Document Center

SECURITY DETAILS

Please provide three security questions which will allow you to recover your password should you forget it.

SECURITY QUESTIONS

Q: Select a question
What city were you born?

A:

Q: Select a question
What is your mother's maiden name?

A:

Q: Create a question
What is your favorite color?

A:

- Each User is required to complete the Contact Information page.

SEI Trust Company

Choose a Trust - My Dashboard - Document Center

CONTACT INFORMATION

Please complete your contact information below.

First Name: (Last Name)

Last Name: (Last Name)

Business Title: (Address)

Company Name: (City)

Address: (17 Freedom Valley Drive)

City: (State)

Home/Office: (PA)

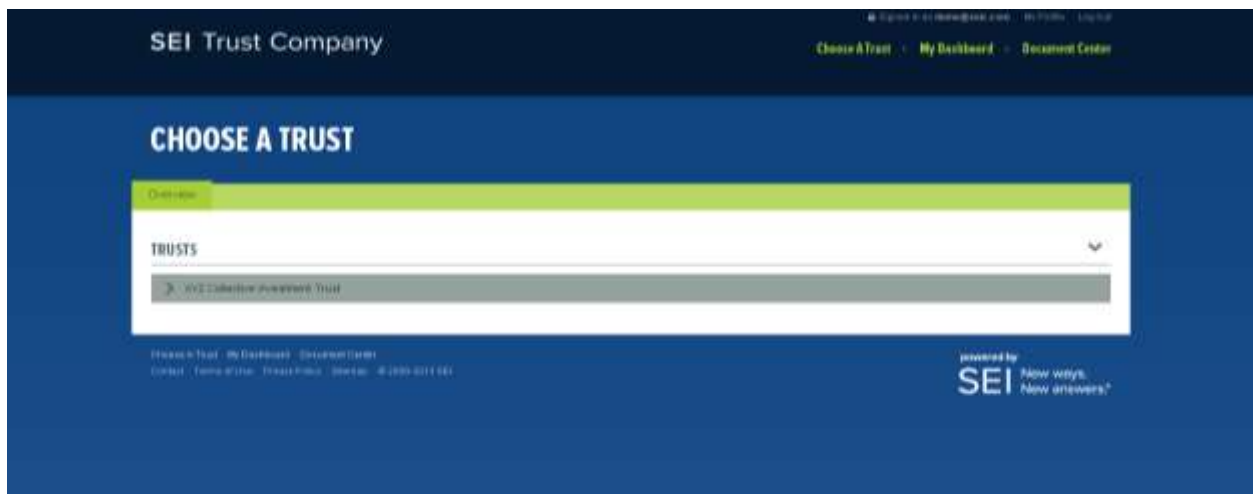
- Once Contact Information is complete you will be directed to the 'Choose a Trust' screen.

II. Login - Existing User

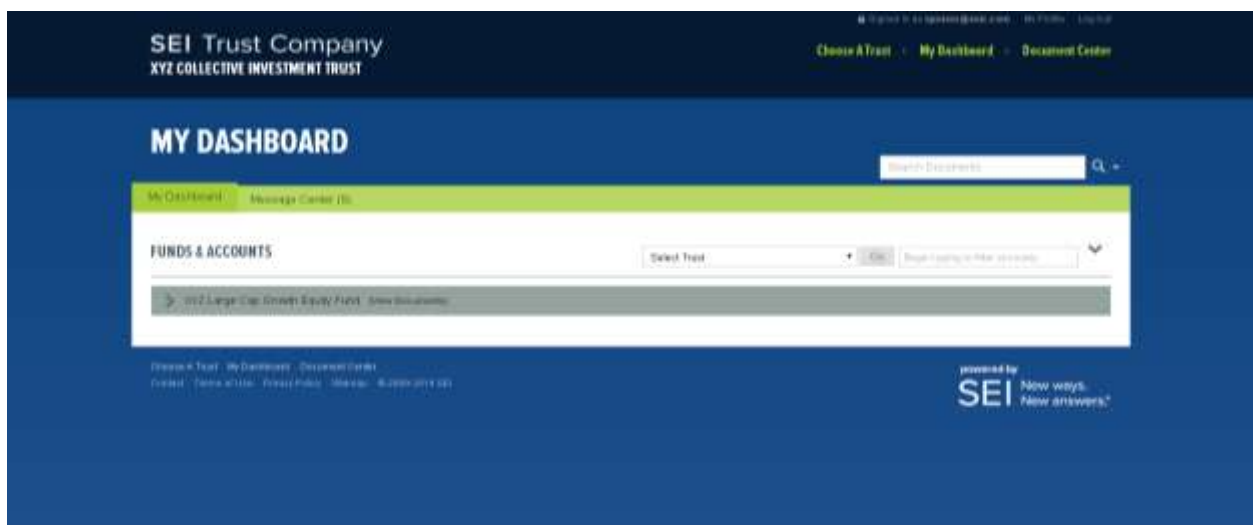
- Go to www.seitrustcompany.com.
- Enter your current user name and password.

III. Accessing Documents

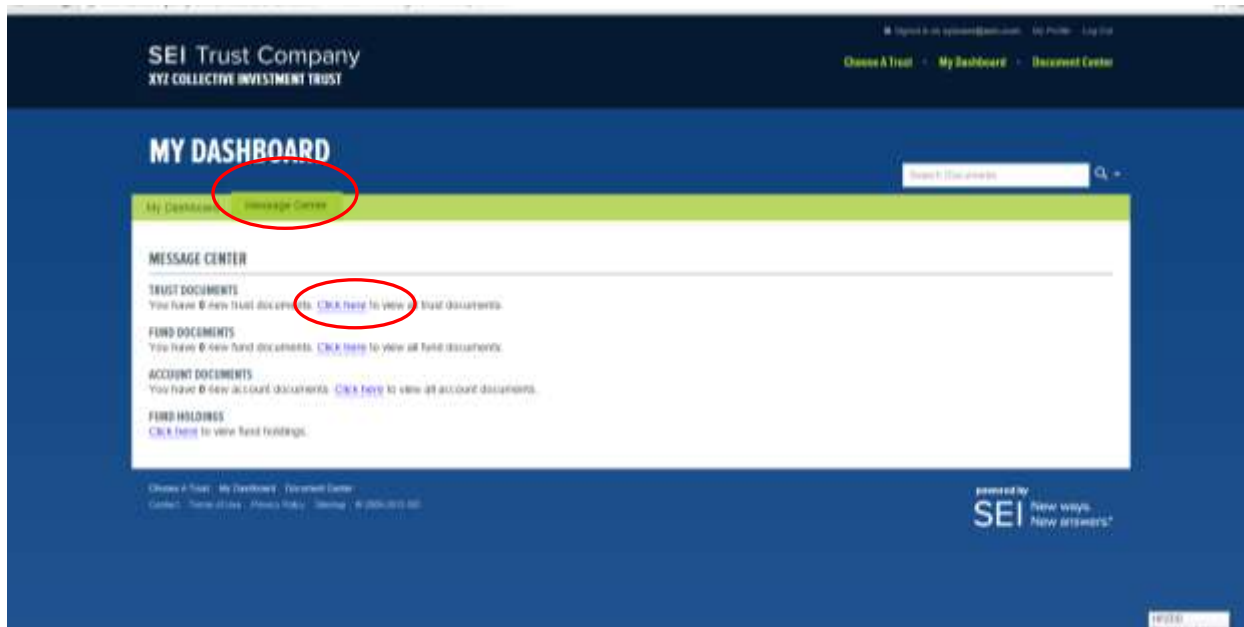
- After logging in, users are directed to the 'Choose a Trust' screen.



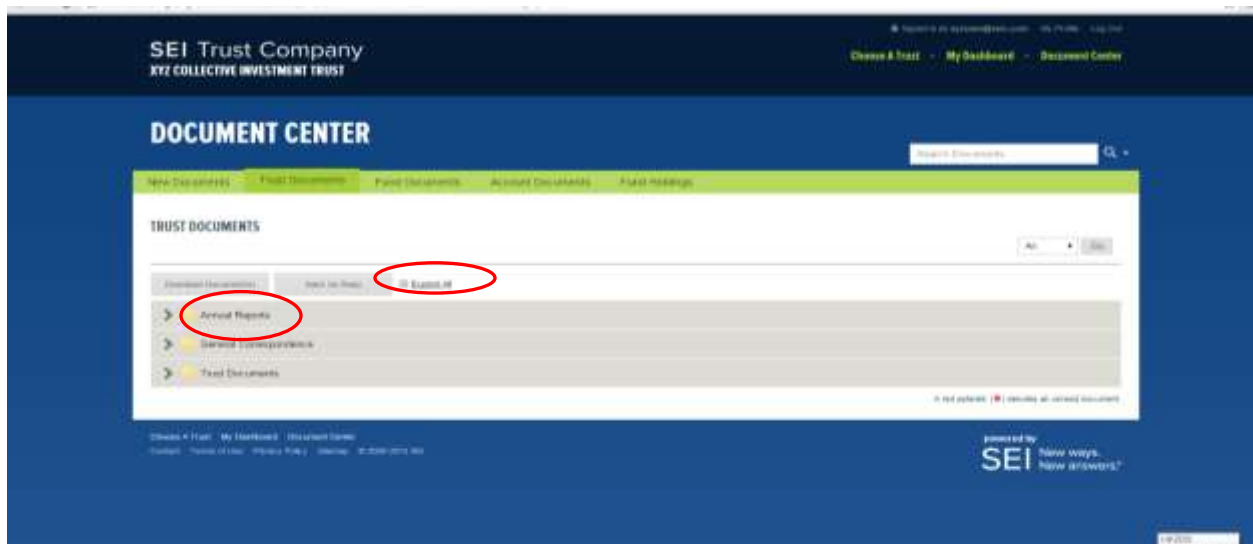
- Click on the name of the Trust that you would like to view.
- This takes you to the 'My Dashboard' page.
 - This page lists all the funds that you are entitled to view.



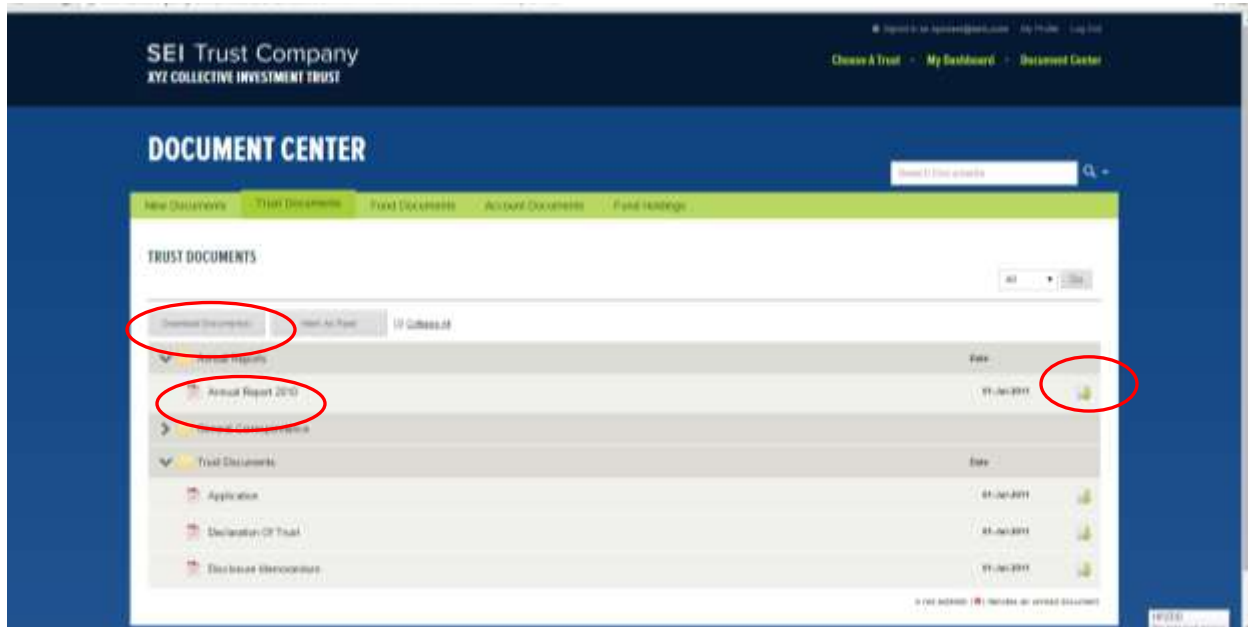
- On the 'My Dashboard' screen, you have two options:
 - Click the 'Message Center' tab to see how many new documents have been loaded since the last time you logged on to the website.
 - Click 'View Documents' next to the fund name to view fund level documents.
- The 'Message Center' tab details the number of new trust, fund and account level documents that have been loaded since the last time you logged on to the Dashboard. Click on 'Click Here' to view the trust, fund or account level documents or fund holdings.



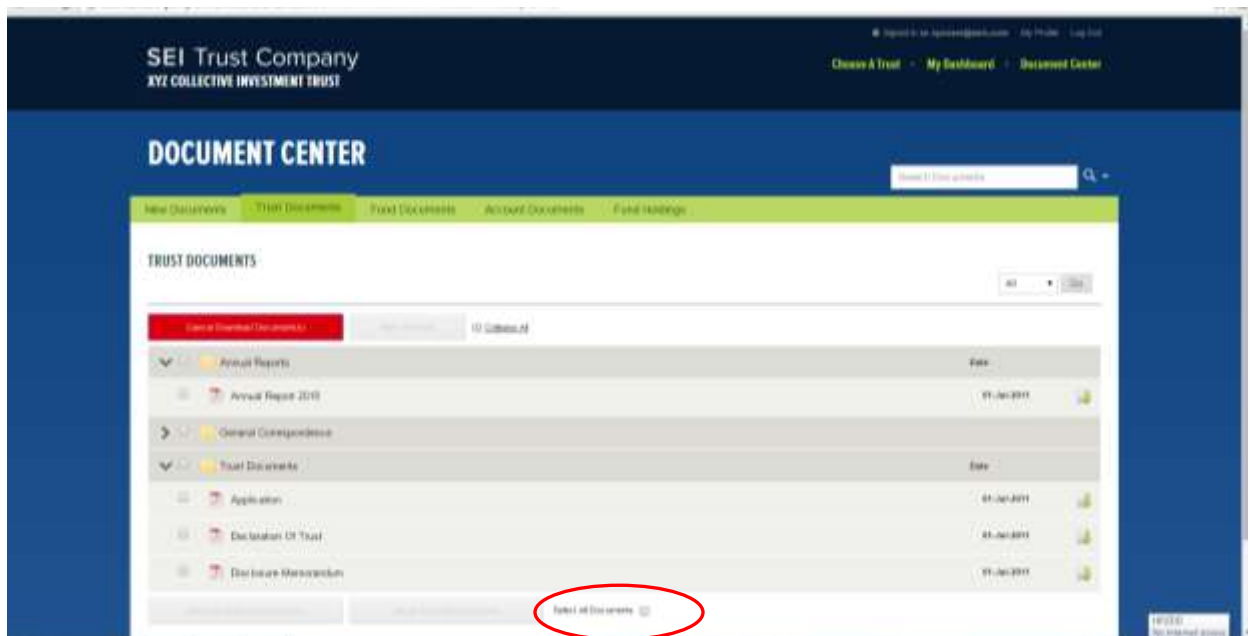
- On the 'Trust Documents' page, you can click on a specific category of documents to view the available documents or you can click expand all to view all trust level documents.

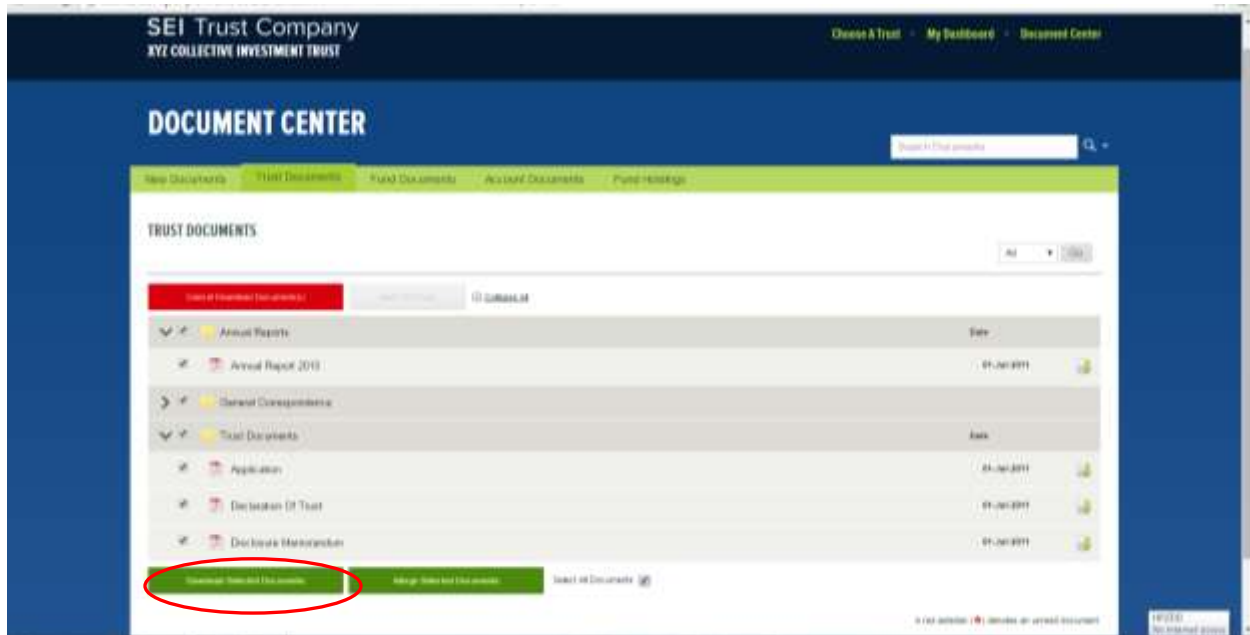


- To open a single document, click on either the document name or the download button. To download multiple documents, click the 'Download Document(s)' button.

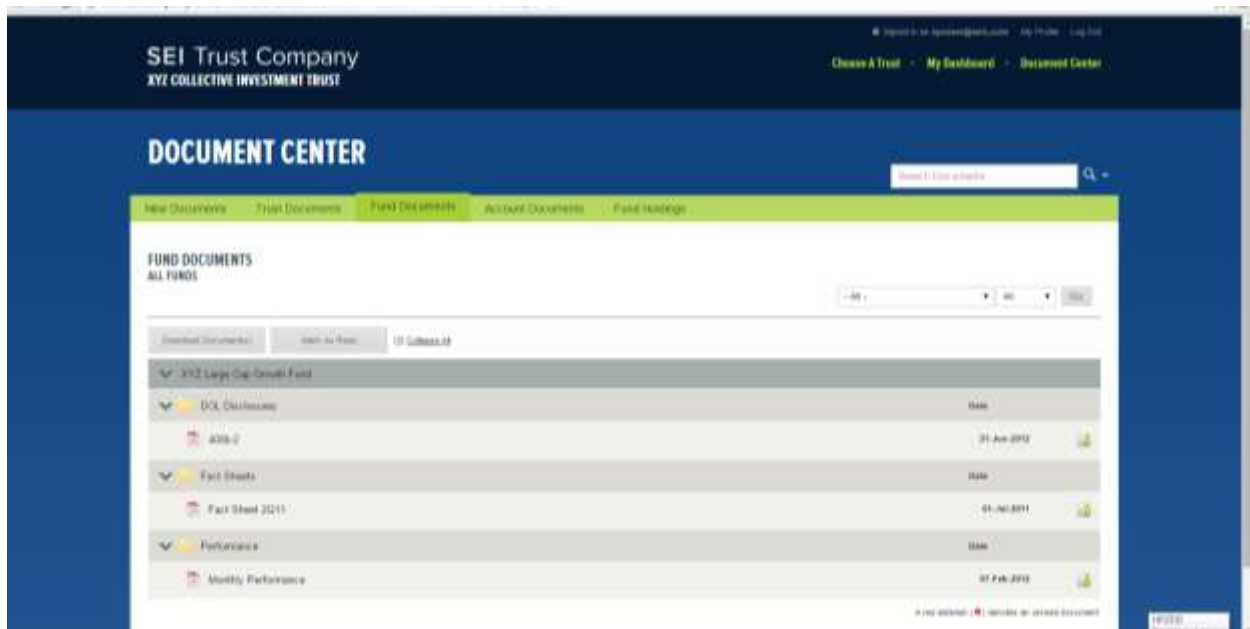


- Selecting the 'Download Document(s)' button allows you to select multiple documents to download. You can also check next to 'Select All Documents' to download all documents on the page.

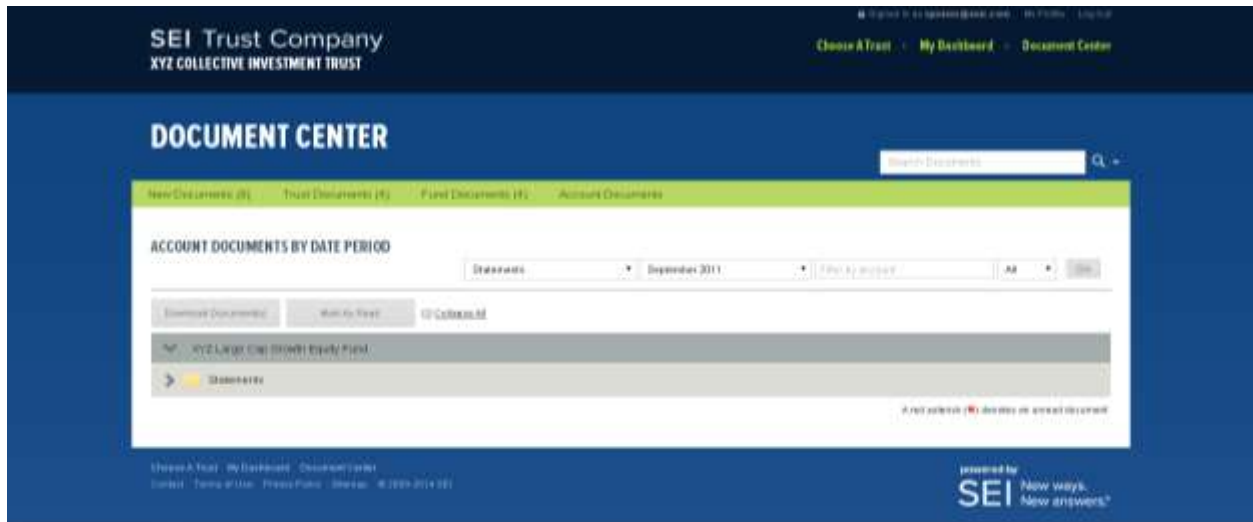




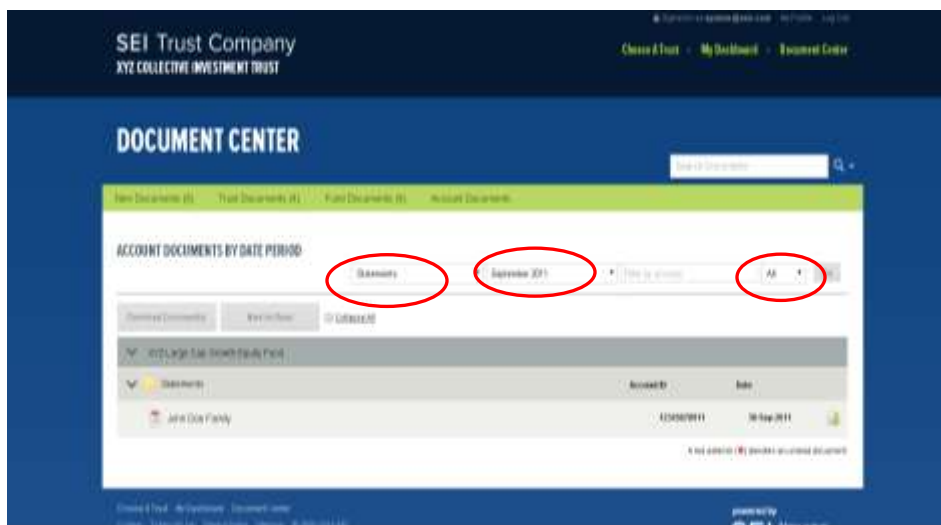
- To view a Fund level document, select the 'Fund Documents' tab.
- The 'Fund Documents' page is structured the same as the 'Trust Documents' page.



- To view Account Documents, click the 'Account Documents' tab. The 'Account Documents' page provides access to monthly investor statements. Please note – additional authorization is required to view account statements.



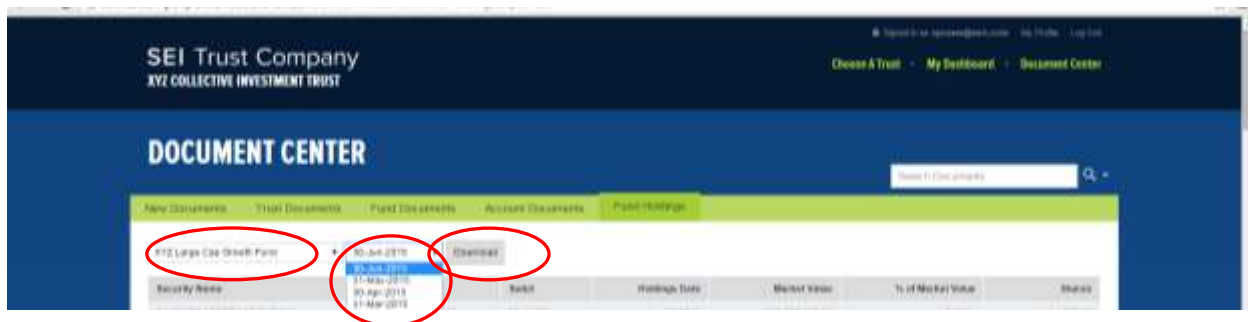
- To view statements from a prior month, use the drop down arrow to select the month and then click 'Go.'
- If you have access to multiple statements, you can navigate between statements by selecting the account name using the drop down arrow.



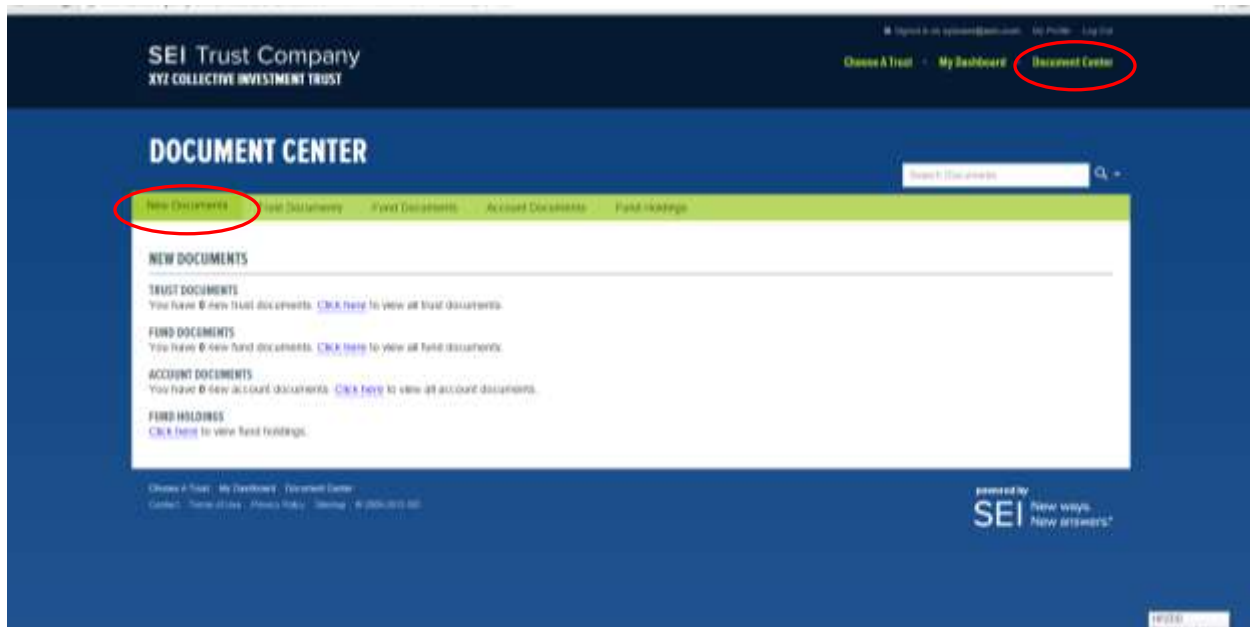
- To view Fund Holdings Reports, click the 'Fund Holdings' tab. The 'Fund Holdings' page provides access to a year's worth of month-end or quarter-end holdings reports. The Advisor for the Fund has determined the frequency and lag period for posting holdings to the CIT Dashboard.



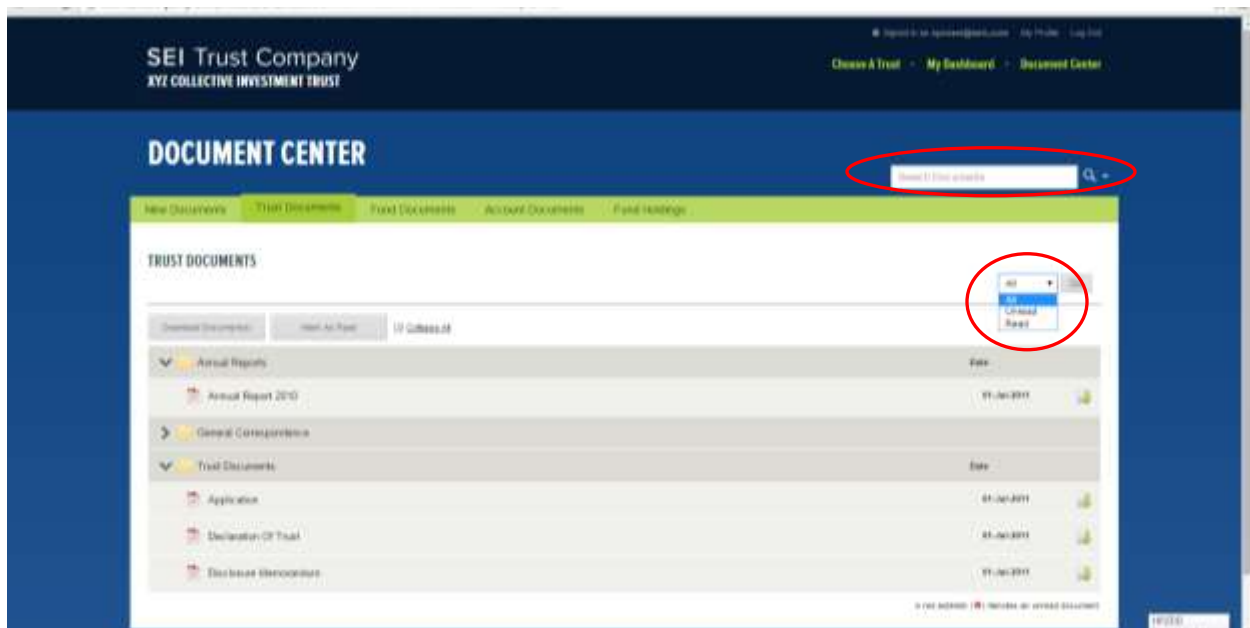
- To view holdings from a prior month-end or quarter-end, use the drop down arrow to select the month and then click 'Go.'
- If you have access to multiple Funds, you can navigate between Funds by selecting the Fund name using the drop down arrow. To download the holdings to excel, click the 'Download' button.



- The 'Document Center' link at the top right of the screen and the 'New Documents' tab provide a summary of unread documents by document type.

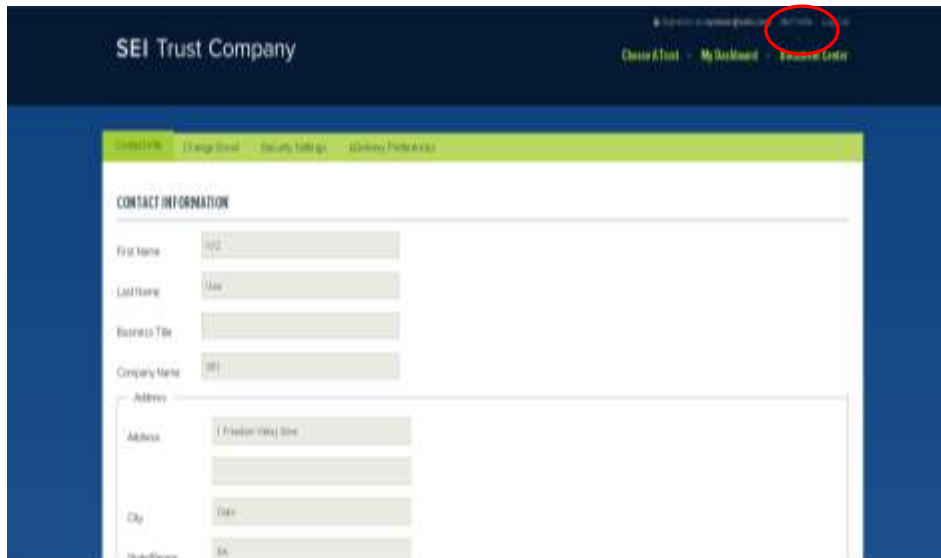


- On the Trust, Fund and Account tabs, you have the option to view all documents, unread documents or read documents.
- You can also search by document name to quickly locate a document.

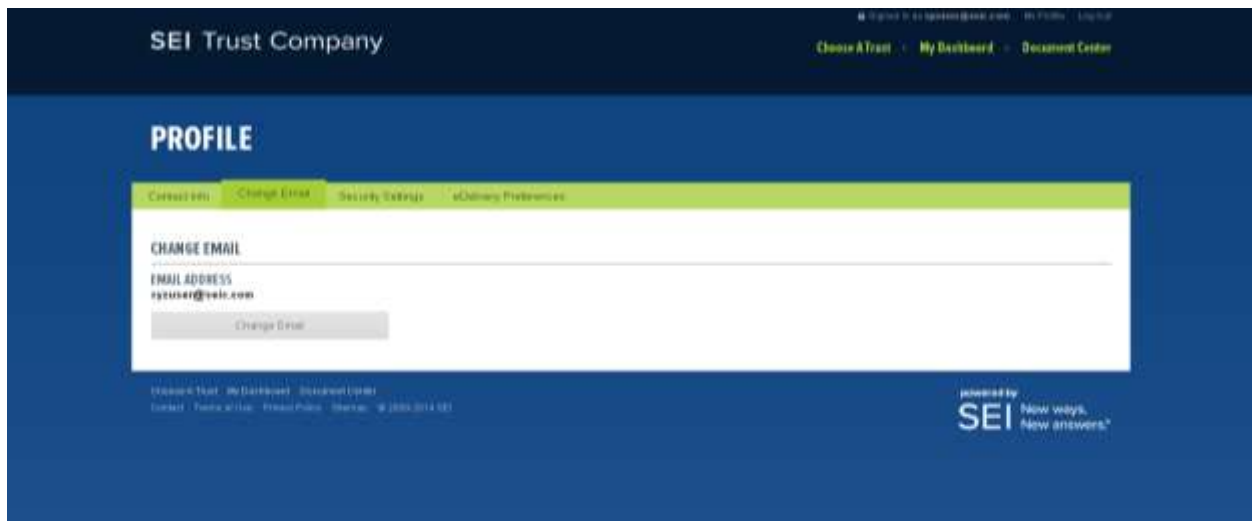


IV. User Profile

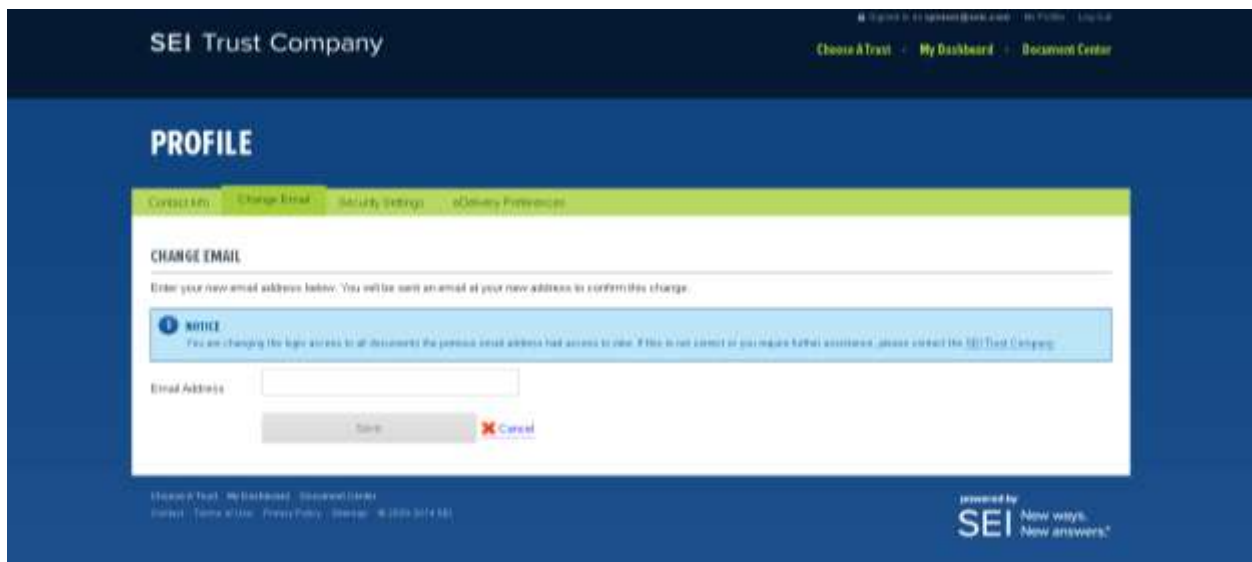
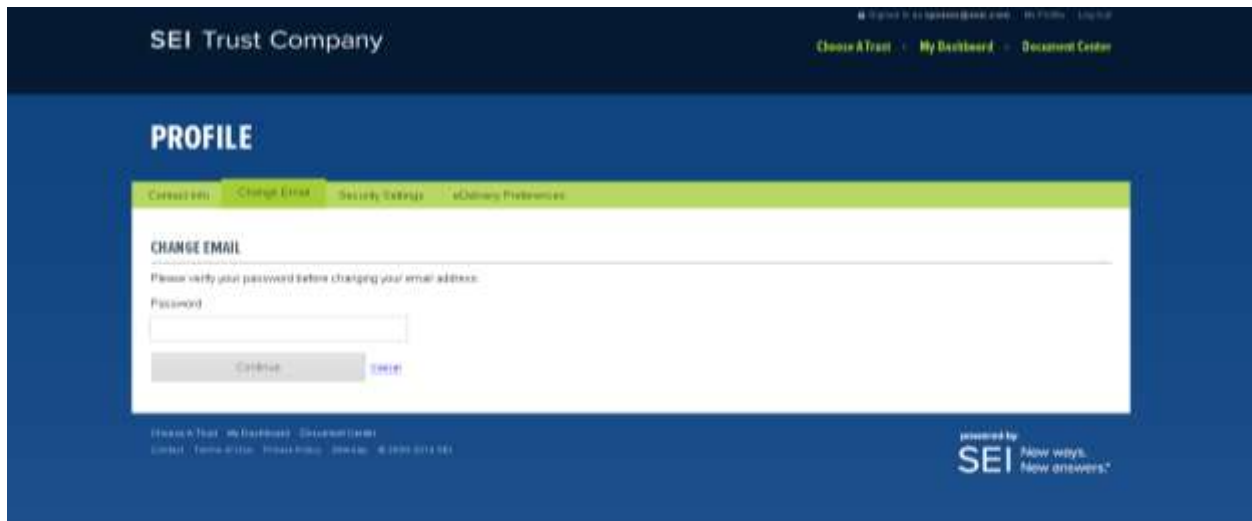
- To update your contact information, click the 'My Profile' link at the top right of the Dashboard.



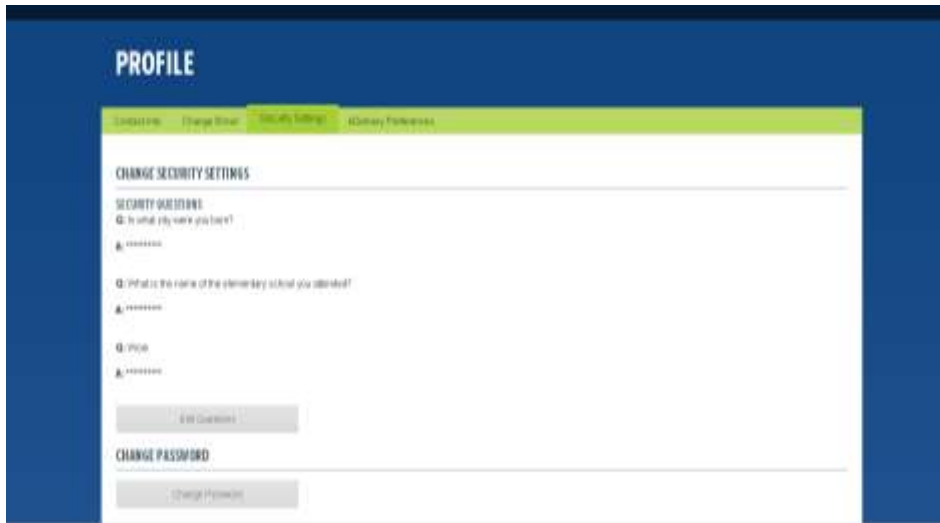
- To change your email address, click the 'Change Email' tab.



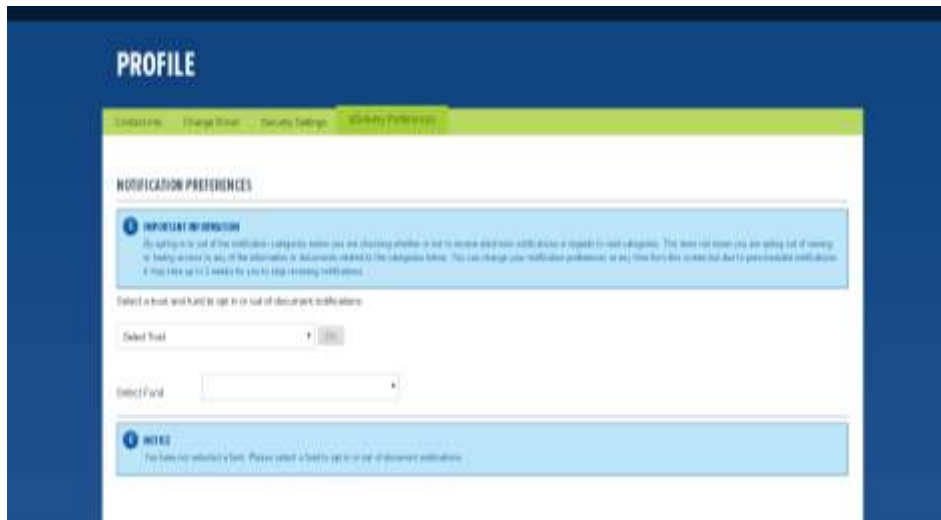
- For security purposes, you must enter a valid password prior to changing your email address.



- To change your security questions or your password, click the 'Security Settings' tab.



- All users will receive email notifications when new documents are loaded to the CIT Dashboard.
- To opt out of receiving email notifications, click the 'eDelivery Preferences' tab under the 'My Profile' link. Select the Trust and Fund from the drop down boxes.



- This provides the ability to choose to opt out of notifications on a trust and fund level by type of document.



V. Troubleshooting

- If you have any questions or issues related to the CIT Dashboard, click the 'Contact' link at the bottom left of the Dashboard for the SEI Trust Company contact information.



VI. Resetting Your Password

- If you forget your password, click the 'Reset Password' link on the Login screen.
 - This will prompt you to answer your security questions.
 - If you answer the questions correctly, a new password will be emailed to you.
- If you do not remember the answers to your security questions or have any issues, you can contact the SEI Trust Company at the number provided on the Login screen.

